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The MARBI Experience

Susan Goldner was named AALL representative to the ALA Machine-Readable Bibliographic Information Committee (MARBI) last year. She will be keeping us up to date on developments in MARC formats and the work of MARBI in the “MARC Remarks” column. We welcome Susan to the ranks of TSLL columnists. – ed.

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Let me begin by thanking you for the opportunity to serve as your MARBI Representative. I am honored to be able to represent you. Please let me know if you have concerns about MARC issues or if there are topics that you would like for me to address in this column. My intention is to use it to report on MARC related issues which directly affect our law libraries. Other specifics from the MARBI meetings will be in my formal annual report, but not mentioned here.

While on the subject of thanks, I want to give Rhonda Laurence a very large thank you. She championed our cause at MARBI meetings for the last five years. During her tenure some very significant changes took place. Of particular importance to us, she fought for the inclusion of loose-leaves in the definition of integrating resources and had a positive impact on the outcome of the repeatable 260 field decision. (More later.) MARC 21 was published harmonizing U.S. and Canadian versions of MARC. Rhonda is a hard act to follow.

About MARBI

MARBI is a committee of three divisions of ALA. But it is more. Currently 34 people are involved, representing a diverse group of institutions. Official participants at these meetings include MARBI Committee Members, who are voting members appointed by three ALA Divisions (ALCTS, LITA, and RUSA). MARBI also has interns, who are appointed by those Divisions, and

(continued on page 22)
2000-2001 Officers and Committee Chairs

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University of Chicago

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Syracuse University

Publication Schedule

Issues are published quarterly in March, June, September, and December.

**Deadlines:**
V.27:no.4(June 2002)......30 April 2002

TSLL EDITORIAL POLICY

*Technical Services Law Librarian* (ISSN 0195-4857) is an official publication of the Technical Services Special Interest Section and the Online Bibliographic Services Special Interest Section of the American Association of Law Libraries. It carries reports or summaries of the convention meetings and other programs of OBS-SIS and TS-SIS, acts as the vehicle of communication for the SIS committee activities, and carries current awareness and short implementation reports. Prospective authors should contact the editors for style information.

Statements and opinions of the authors are theirs alone and do not necessarily reflect those of AALL, TS-SIS, OBS-SIS, or the TSLL Editorial Board.

Subscriptions: Provided as a benefit of membership to Sections members. Non-member subscriptions: Domestic: $10.00; Foreign: $20.00. Contact the *TSLL* Business Manager or the American Association of Law Libraries.
Greetings Fellow OBS Members:

One of the most memorable institutes that I ever attended was the Cataloging Institute in Santa Clara in 1992. It is still memorable because of its outstanding faculty, superior material content, delicious food and thrilling sightseeing. I had the privilege and honor to meet the keynote speaker, Dr. Michael Gorman. As a result of that institute, I became a believer that AALL really educates. OBS understands and supports the mission of AALL. That is why OBS’s second strategic direction is “OBS educates!” Now that you have the opportunity to review the OBS Strategic Plan on the web site, you may ask the question, “How well is OBS reaching its mission to educate?”

OBS takes pride in presenting solid and well-developed programs at the annual meeting. We invite members to serve on the OBS Education Committee. It provides a great opportunity to learn how program proposals process works, from critiquing to the final review of proposals. If you are interested in writing, submitting or coordinating a proposal, the OBS Education Committee has the tools to assist you. I can truly say that OBS sponsored programs have enriched my professional life.

Here are the programs accepted for Orlando 2002.

✵ The Catalog vs. the Homepage? Best Practices in Connecting to Online Resources, Coordinator: Georgia Briscoe


✵ “Search Reopened” How to Hire the Right Technical Services

Candidate the First Time Around, Coordinator: Barbara Plante

✵ Making Subject Connections: Plugging Into the Subject Authority Cooperative Project, Coordinator: Chris Tarr (co-sponsored with TS)

We also educate through OBS Standing Committees: Local Systems, OCLC/WLN, RLIN and the Web Advisory. It is highly recommended that you volunteer to serve on one of these committees and attend the open committee discussion meetings at the annual meeting. This provides an outstanding forum to share information and ideas and to glean insights from other colleagues. You will be better informed of new developments in local systems and their impact upon libraries.

Our newsletter, Technical Service Law Librarian (TSLL), is a wonderful resource that enriches and educates. Since it is one of my favorite newsletters, I always try to read it from cover to cover. OBS is committed to supporting the TSLL newsletter because it is an essential tool for OBS members.

We use our electronic listserv as a medium to educate by sharing which resources are available. It also serves to encourage participation in discussion groups and making announcements. And, our very popular “Website of the Month” is posted to this listserv.

We want to utilize our OBS web page as an educational and informative tool. At the present, we are working to enhance and update our web page. The OCLC/WLN Committee is also working to launch its page soon.

Since I bought my house, I have developed a passion for gardening and have attended several workshops and seminars in my community. I look forward to reading the Thursday’s Garden section of our local newspaper. I have also purchased several gardening books and checked out new websites. I relate my gardening to OBS because both provide fertile environments, which allow our lives to be enriched educationally.

OBS Update:

Mary Jane Kelsey, Vice Chair-Chair Elect has conducted our annual survey via the web. She is compiling the results to be published in TSLL later on. I really appreciate all of you that took the time to send the survey, volunteered to run for office or served in a committee. The Education Committee has been formed and will be working on program proposals for Seattle under the leadership of Mary Jane Kelsey, Education Chair.

Brian D. Striman, Nominations Committee Chair, with Cynthia Cicco and Karen Nobbs, committee members, have announced the slate of nominees for 2002 elections.

For Vice-Chair/Chair Elect

Kevin Butterfield (Univ of Illinois, Urbana-Champaign)

Eloise Vondruska

(Northwestern University)

For Member-at-Large

Ruth Patterson Funabiki

(University of Idaho)

Arturo Torres

(Texas Tech University)

And remember: OBS educates!

Ismael Gullon

Mercer University

Gullon_i@mercer.edu
The year 2002 began the same way that 2001 ended, with a flurry activity for the TS-SIS. In November, Marla Schwartz asked to step down as the AALL representative to SISAC. AALL looks to the TS-SIS for a recommendation of a member to fill this position. In 1998, SISAC merged with BISAC to become BASIC. Although, BISAC and SISAC continue to maintain their original names in reference to the data interchange formats for both areas, the TS-SIS Executive Board decided to recommend to the AALL Executive Board a replacement for Marla to BASIC. We were looking for a librarian with a strong interest in metadata, EDI, serials, a love for standardized formats, and who could go to ALA meetings! With the help of the OBS-SIS Executive Board, three candidates were recommended for the position. Each was asked to submit a resume and a brief statement to the chair and vice-chairs of TS and OBS. After careful consideration, it was our recommendation to the AALL Executive Board that Ellen Rappaport be appointed to complete Marla’s term. The AALL Executive Board quickly confirmed Ellen’s appointment, and her first official outing was at mid-Winter ALA in January! I want to thank Christina Tarr, TS-SIS vice-chair/chair elect, Ismael Gullon, OBS-SIS chair, and Mary Jane Kelsey OBS-SIS vice-chair/ chair elect, for their input and help in filling this vacancy. Marla is a dear friend, and replacing her was not easy.

By the time you read this column, Christina will have already notified the membership of the 2002 Technical Services Special Interest Section Annual Membership Survey and Volunteer Form. This year, the survey and volunteer form will be in electronic format only. We hope to cut postage and photocopy expenditures for the Section, as well as for your organization. Above all, we hope that the efficiency of electronic forms will encourage more members to respond to the survey. The membership’s response to the new format will decide whether the survey and volunteer form will continue to be in electronic format only, or if there will be a return to the combination of mass mailing and electronic access. Please take the time to fill out the survey and the volunteer form. Remember, this is also your opportunity to become more involved in a SIS whose purpose is to promote the professional interests of its membership. The volunteer form is our principal means for selecting individual members for professional service within the Section. If you are a new member or have never volunteered in TS-SIS, I encourage you to step forward. Involvement on committees and within roundtables is an excellent way to become better acquainted with your peers, to develop lasting friendships, to develop your skills and professional interests, and to possibly pursue a leadership role in AALL. Your involvement ensures that the Section continues to move in the direction which best supports the professional goals and concerns of the membership.

The TS-SIS has a long history of collaborative partnerships with other SISs, most notably with the OBS-SIS. A new initiative is underway with the Legal History and Rare Book (LHRB) SIS regarding preservation of historical legal material. The AALL Preservation Policy identifies the TS-SIS Committee on Preservation, chaired by Will Meredith, as the primary preservation group in AALL. In an effort to address the preservation initiatives in the AALL Strategic Plan (Outcome 4C: Historical legal materials are preserved and accessible), Katherine Hedin, chair of the LHRB-SIS, will formally designate a liaison to sit on the TS-SIS Preservation Committee. The liaison will report on the work of the Committee in the LH&RB Newsletter and in other forums.

Last year, the TS-SIS Bylaws Committee, chaired by Eloise Vondruska, worked diligently on recommendations for proposed bylaw changes and changes to the TS-SIS Handbook. The proposed bylaw changes were approved by the membership during the 2001 TS-SIS Business Meeting in Minneapolis, and the AALL Bylaws Committee approved the changes. The revised bylaws can be found on the Section’s webpage at <http://www.aallnet.org/sis/tssis/tshndbk/bylaws.htm>. This year Alva Stone, immediate past chair, has been busy updating the TS-SIS Handbook as a result of the changes in the bylaws. The handbook will be available on the TS-SIS webpage soon. The purpose of the handbook is to offer management guidelines to current and future officers, committee chairs, and the membership of the TS-SIS. I would like to thank Alva for volunteering to review and update these guidelines. It has been eight years since the handbook’s last revision!

JoAnn Hounshell
Northwestern University
jhounshell@law.northwestern.edu
Wendy Medvetz is the first recipient of the TS-SIS Education Grant. She used the grant to attend a workshop last fall. Here is her report of that experience. — ed.

November 2-3, 2001

Approximately 35 academic, government, and law firm librarians attended the New Perspectives on Law Library Acquisitions and Collection Development workshop on November 2-3, 2001 at American University Washington College of Law in Washington D.C. The 2-day workshop featured speakers Christine Graesser, JoAnn Hounshell, Janis Johnston, Scott Larson, Phyllis Marion and James Mumm. Patrick Kehoe, Director of the American University Washington College of Law Library, started off the workshop by welcoming all participants and giving good advice on lunch locations! Several librarians from academic, government, and law firm libraries attended, which allowed the participants to consider several points of view.

The workshop started off with a session titled “New Perspectives in Collection Development Policies and Selection Criteria” and was presented by Phyllis Marion, Director of the Library and Professor at California Western School of Law. Phyllis provided an overview of collection development and discussed collection building. She related that a collection development policy is a tool used to guide the intellectual process. In her presentation she discussed with the participants the need for a collection development policy. Some reasons for having a policy include:

- Consistency,
- Justification,
- Planning, and
- A Training Tool.

Some challenges libraries are facing are flat or shrinking budgets while prices are escalating; the growth of electronic resources, and access versus ownership. Three approaches to collection development policies were outlined: conspectus, narrative and mixed. A conspectus approach involves examining the collection by classification number and subject and then outlining the collection by existing collection level and current collection level. A goal level can also be included. The collection can also be evaluated by asking what the library needs by talking to faculty, staff, and students. Also, separate or integrated policies for electronic resources were discussed at length. Finally, Phyllis listed and explained the elements of a collection development policy.

After a short break, JoAnn Hounshell, Head, Acquisitions, Northwestern University School of Law began the second session “Electronic Resources Collection Development.” In this session, the participants learned that electronic resources include CD-ROMs, commercial database, E-journals, and E-books. JoAnn also recommended that the collection development policy include electronic resources. Unique sections in the policy can explain selection criteria, content and how it relates to the existing collection, cost benefits of purchasing multiple formats, and access issues. She went on to explain the purpose of licensing agreements. One important point was to find out who has the authority to negotiate licenses in your library or institution. JoAnn also provided a valuable list of websites containing license principles and model contracts including:

- Association of Research Libraries
  <http://www.arl.org/scom/licensing/principles.html>
- JSTOR
  <http://www.jstor.org/about/license.html>
- Liblicense
  <http://www.library.yale.edu/~license/modlic.html>
- Task Force on the CIC Electronic Collection
  <http:NTX2.cso.uiuc.edu/cic/cli/licguide.html>
- University of California Libraries
  <http://sunsite.berkeley.edu/Info/principles.html>

The afternoon began with a session on “Implementing Your Collection Development Policy.” The group split into 2 sections, academic librarians, and government and law firm librarians. This allowed each group to discuss the unique perspectives of the different settings. The academic portion was presented by Phyllis Marion while the private/government section was presented by Mr. Scott Larson, Librarian, Beveridge & Diamond, P.C. Each group discussed various issues of a collection development policy such as: evaluating the current collection,
selection, items that fall outside of the policy, outsourcing, deselection, and cooperative collections.

The final session for the day was “Accounting and Financial Management in the Electronic Age” presented by Mr. James Mumm, Acquisitions/Serials Librarian, Marquette University Law Library. This informative session included a discussion of financial management issues. Some issues identified by the group included: reconciling the libraries’ figures with the finance office figures, planning for unplanned and unpredictable cost increases, and types of budgets. Mr. Mumm discussed his process of getting from source document to final payment. The importance of retaining source documents such as purchase orders and sales receipts as well as other documents is very necessary in order to make sure it is evident what is being purchased and paid for as well as to verify that mistakes are caught and corrected. Mr. Mumm presented and explained his methods of reconciliation and used his impressive spreadsheets as examples.

Day two of the workshop was as informative as the first! We started out day two with a session on outsourcing, deselection, cooperative collection and other cost cutters in the electronic age. The group listed the following as advantages of outsourcing: saves time and money, eliminates routine, and frees staff time. A disadvantage of outsourcing is the potential to lose control of acquisitions dollars. Some cost cutters highlighted included: controlled purchasing, routine reviews of the collection for duplication, cooperative collection development, consortial licensing agreements, and canceling subscriptions that don’t necessarily need to be updated every year.

In the next two sessions we continued our discussion of accounting and financial management and included a section on electronic ordering and payment. James Mumm and Scott Larson led these sessions with Scott heading the group of law firm librarians. Many libraries represented have started to use electronic ordering. Some advantages of electronic ordering listed by the group included: quicker than paper, more efficient, discounts, ease of comparing prices, and readily available bibliographic information. The class listed some useful sites to compare prices including: <http://bookfinder.com> and <http://bestwebbuys.com>. Out of print searching is available at <http://alibris.com> and <http://21northmain.com>.

The day ended with a presentation by Christine Graesser of Brown Rudnick Freed & Gesmer. Christine discussed acquisitions practices and ethics, vendor relations, and information about CRIV (Committee on Relations with Information Vendors). She emphasized the importance of ethical acquisitions and understanding the vendors’ role and point of view. Christine reminded the group to stay objective when dealing with vendors while also being responsible and knowledgeable about licenses and contracts. In order to have a good relationship with vendors, librarians should be professional in their communication. She wrapped up her session with an explanation of the functions of CRIV.

Each presenter brought a unique and informative presentation to the group. The workshop was a great place to meet and learn from several knowledgeable colleagues and was organized so that several library viewpoints were presented.

During the week of November 5-9, 2001, more than a dozen librarians exchanged information and recommendations on the topic of library system migration. The lively listserv discussion, moderated by Georgia Briscoe (Associate Director and Head of Technical Services, University of Colorado Law Library) and Jean Willis (Associate Director for Information Systems, San Diego County Public Law Library), delved into many problems which law libraries considering system migration must consider.
The initial question, “Why migrate?” provoked a discussion of the reasons why law libraries undertake such a laborious, time-consuming activity. Some law libraries, frustrated with the level of vendor support for their current system, or burdened with a vendor who cannot compete with available technologies, look elsewhere for a new system. Others go in search of a new system in response to patron expectations of greater functionality than the current system can offer. Libraries have also pursued new systems in order to better dovetail with the IT platforms of their parent organizations, in order to integrate their systems with financial or human resources software used by the parent organization, or as members of library consortia with shared IT needs. Several participants also made the point that the final selection of a new system in a shared environment may not reside with the law library itself, but may be the result of a selection process in which the law library has only one vote.

Participants also debated the merits and dangers of using consultants in the process of finding a new system. Some noted that consultants have been known to harbor a bias in favor of certain system vendors, or to submit “boilerplate” reports written largely before the site visit. A few participants cited the difficulties inherent in expecting an “outsider” to grasp, in a relatively short period of time, the unique needs of the law library and the individual abilities of current staff members. It was pointed out, however, that a small, insular library might benefit from the outside perspective of a consultant, who might be able to see ways in which to use existing staff differently. Several participants also stressed the importance of clearly expressing the needs of the law library to potential consultants, and agreed that asking colleagues for the name of a trusted consultant, and checking the references a consultant offers, are two ways to avoid disappointment with the consultative process.

In addition to the use of consultants, participants identified other strategies they had used in selecting a next-generation system for their law libraries. Among these were site visits to libraries using the system of interest, as well as exploring those libraries’ OPACS; talking with librarians in libraries employing the possible system, especially if they use the system in coordination with other institutional software; exploring the web sites of system vendors; joining system users groups, if permitted; and subscribing to user group listservs, when allowed, in order to spot potential problems and to ask questions. Attendance at regional user group meetings, which some vendors permit before a contract has been signed, is another means of finding out details about a vendor. Participants cited several web sites they had found helpful in the selection process, especially during the process of writing the RFP. Among these are <www.ilsr.com, www.libraryhq.com>, and Pacific Lutheran University’s own migration web site, <http://plu.edu/~lib/migration/home.html>.

Participants also discussed system selection criteria, and advised those responsible to attend seminars on standards (such as Z39.50 and MARC21) and on relational database structure before examining system specifications. Among selection criteria identified by participants as of great importance to most law libraries were support of standards (such as those mentioned above); support for electronic ordering, claiming, and invoicing; and support for electronic collections and for hyperlinking. Several participants also cautioned librarians seeking new systems that customizable systems require more local programming knowledge or IT department support than some law libraries are able to muster.

Training on the new system, which should take place as soon as possible after implementation, was the topic of lively discussion. Several participants, while noting that freeing up sufficient staff time from regular duties sometimes makes scheduling of training a challenge, cited good staff training as critical – staff members who receive inadequate training are liable to be uncomfortable with the new system, and to resist using it. Several
As of this writing the JRGC has not received any applications for review, so we haven’t been awarding any money for research. It is possible that the committee has not received any applications because I haven’t done any aggressive marketing or promotion of this valuable “enabling” opportunity for our colleagues. Promotion needs to be done: in law-lib, ts-sis, obs-sis lists, Spectrum, mass-mailings, leaflet “drops” over large population areas, subliminally in nationally syndicated TV sitcoms, radio, other means as appropriate. The last couple of years, Corinne Jacox did a fine job of “rustling the bushes” to try to get interest for potential applications for this wonderful grant (up to $1,000!). If you want to get to the JRGC information quickly on the Web, just do a Google search with the term “jrgc” and then click a few times on the highlighted places on the web pages you get, you’ll eventually get to the info you need.

I received the final report from Larry Dershem, who received grant funding for the year 2000 for his research. It’s 66 pages long and copies need to be made and sent to the OBS and TS Chairs, and the original work needs to be sent to each member of the JRGC for review. Later there will be some method for sharing his project either available via the Web, or a condensed version and review in a future TSLL.

A JRGC grant was awarded in 2001 to Susan Goldner and Lorraine Lorne to help assist them in compiling a 25 year retrospective index and then maintaining it annually. Susan Goldner reported to me (Feb. 20, 2002) that she will be able to give the JRGC an interim progress report for the June TSLL issue.

One of the things that the JRGC needs to work on and have completed prior to the 2002 AALL Annual Meeting is to have an authorized final version of detailed guidelines that spell out more accurately the guidelines which “govern” the JRGC (e.g., appointments of committee members, terms of each member, reporting structure between JRGC Chair and OBS and TS Chairs, and time lines so Chairs know when and how they need to appoint new committee representatives), as well as to have these improved guidelines in both OBS and TS manuals and in both web sites as appropriate. On June 20, 2001 Ellen McGrath asked me to work on the JRGC guidelines, polish them up, make some clarifications and then send the final draft to both TS and OBS Chairs for review and comment. That was 9 months ago. Funny how the time passes, isn’t it? You ever experience that? Anyway the JRGC will be working in the next few months on this. Another report will be made for the June 2002 TSLL and posted on both OBS and TS electronic discussion lists.

Composition of membership in the JRGC is found in the Research & Publications column of this TSLL issue.

Brian Striman
JRGC Chair
Peer-to-Peer Networks

While the copyright and digital rights management (DRM) issues regarding the use of peer-to-peer networks to exchange music files has been well documented in the Napster cases, their use as a vehicle for exchanging ebooks or other digital text files has begun to attract the attention of publishers and libraries. The Napster cases were important to authors and publishers because the same kind of technologies used for trading music online are already beginning to be applied to electronic books, text and pre-print archives.

What? Is.com defines peer-to-peer (often referred to as P2P) as a type of transient Internet network that allows a group of computer users with the same networking program to connect with each other and directly access files from one another’s hard drives. Napster and Gnutella are examples of this kind of peer-to-peer programs.

The user must first download and execute a peer-to-peer networking program. (Gnutella.net is currently one of the most popular of these decentralized P2P programs because it allows users to exchange all types of files.) After launching the program, the user enters the IP address of another computer belonging to the network. Once the computer finds another network member on-line, it will connect to that user’s connection (who has gotten their IP address from another user’s connection and so on). Users can choose how many member connections to seek at one time and determine which files they wish to share or password protect. Corporations are looking at the advantages of using P2P as a way for employees to share files without the expense involved in maintaining a centralized server and as a way for businesses to exchange information with each other directly.

The initial, high profile use of these networks was for the transfer and exchange of music files. The resulting use was, while dramatic, in violation of a number of copyright laws. Since the networks care little for the types of files being traded, using them to transfer eBooks or other text files would be relatively simple. This has not escaped the attention of publishers. As digital content and e-publishing become commonplace, duplicating such content becomes easier and more practical. This raises a host of copyright and digital rights management issues. One of these issues of concern to publishers relates to a technological byproduct of transferring digital files. Even with the best of intentions says Allen Adler, vice-president for legal and government affairs of the Association of American Publishers in a recent Time magazine article, digital transmission creates temporary copies that the library will retain while the user has the content. One solution, says Adler, would be a simultaneous transmission and deletion system where the library deletes its copy while the borrower has it, and the borrower deletes it upon returning it to the library. netLibrary, prior to its demise last year, pioneered work on such technologies and digital rights management with ebooks. Its efforts earned netLibrary a seat with NISO. Hopefully, this work will continue. OCLC has purchased the eBook and MetaText eTextbook divisions of netLibrary.

How then does the development of peer-to-peer networking impact technical services? Roy Tennant, in a recent Library Journal column, points out that, first of all, as individuals begin using Gnutella to serve copies of articles, papers, and even books, users may increasingly find it easier to bypass the library entirely to locate information on their own. As we know, they will likely be missing much that we could provide, even within the Gnutella universe given its nearly brain-dead method of searching (by file name, no metadata is associated with the files). Tennant quotes Karen Coyle of the California Digital Library as saying, “The folks who developed Gnutella are very sophisticated in their knowledge of networking, but they don’t know squat about information retrieval. They need us, even if they don’t know it.”

While much attention is focused on copyright and DRM issues, as it should be, there is also a growing concern over the provenance of the files being exchanged. How can a Gnutella user be certain the ebook transcription they are acquiring over their peer-to-peer network is faithful to its source?

Tennant also points out the likelihood of another growing parallel universe of information developing on these peer-to-peer networks that may not (at least initially) be available through web search engines. To add another wrinkle, individual users join and leave the Gnutella network at will, which suggests a randomly pulsing (growing and shrinking) universe of information. What is there now may not be there in a few minutes, and vice versa. These issues are not new to those of us coping with web-based resources, especially, of late, government documents.

Proposals have already been put forth to use peer-to-peer networking technologies in libraries on a more practical level. Daniel Chudnov of The Yale University School of Medicine imagines providing researchers with a new bibliographic management tool that
combines file storage with a Napster-like communications protocol. He dubbed the new tool “docster”. Instead of just citations, docster also stores the files themselves and retains a connection between the citation metadata and each corresponding file. Somewhere in the ether, Chudnov envisions, would exist a docster server to which those researchers connect. They’re reading one of their articles, and they find a new reference they want to pull up. What to do? Just query docster for it. Docster will figure out who else among those connected has a copy of that article and, if it’s found, requests and saves a copy for our friendly researcher.

Of course, Chudnov asserts, we cannot do this. Libraries depend too much on copyright to attack the system so directly. But what if, he proposes, we focused instead on altering the P2P model enough to make it explicitly copyright-compliant? As repositories of electronic texts, such as those based on the Open Archives Initiative model, the need to connect and exchange data between them grows as well. As Technical Services librarians, we will all have a role in acquiring and providing accurate and robust access to these materials.

For More Information:

Docster: The Future of Document Delivery / by Daniel Chudnov  
<http://www.libraryjournal.com/docster.asp>

“Peer-to-Peer Networks: Promise & Peril” / Roy Tennant  
Library Journal, v. 125, no. 15 (p. 28-30)

Electronic Rights Grab the Spotlight: Publishers Ponder Napster & Random House Cases / by Danny O. Snow  

Are Libraries the Next Napster / by Katherine Bonamici  
<http://www.time.com/time/nation/article/0,8599,168798,00.html>

Whatis.com  
<http://whatis.techtarget.com/>

I am not a manager myself, but I need to tell you about my boss. All of us who work for her have experienced the same problem: she takes credit for every success and blames us for every failure. The most recent example is the most flagrant: I went to her with a proposal to eliminate a large backlog of loose-leaf filing. I suggested that everyone in the department, including staff who normally have nothing to do with loose-leafing, file one release a day from the backlog until it was eliminated. No one would need to spend more than fifteen or twenty minutes a day on this activity. She agreed that this was a good idea, then told me to go ahead and arrange it. I did, with the help of a few others, and soon we had a good plan, charts, schedules, and everyone seemed enthused. Our manager filed one release at the beginning, but then she claimed to be unable to work it into her schedule. That was OK. Everyone else (about ten of us) had a great time – we made a sort of contest out of it. The backlog was gone in six weeks. Then, just the other day, in the law school’s newsletter, there was a feature about our manager, and it included a paragraph about her recent initiative to eliminate the backlog of loose-leaf releases. It was written to indicate how she can see problems and come up with solutions in a creative way. It was even suggested that she had to convince her reluctant staff to go along with the idea! Needless to say, we all felt betrayed and humiliated. We weren’t too surprised that she took no notice of the success of the project (she never compliments), but the rest of it hurt us deeply. I’m not sure if there is anything to do about it. I just wanted you to know that not every manager out there has all those great qualities you are always talking about.

Sincerely,

Doormat

To contact Miss Manager, please write in care of the TSLL editor

Dear Miss Manager:

I am not a manager myself, but I need to tell you about my boss. All of us who work for her have experienced the same problem: she takes credit for every success and blames us for every failure. The most recent example is the most flagrant: I went to her with a proposal to eliminate a large backlog of loose-leaf filing. I suggested that everyone in the department, including staff who normally have nothing to do with loose-leafing, file one release a day from the backlog until it was eliminated. No one would need to spend more than fifteen or twenty minutes a day on this activity. She agreed that this was a good idea, then told me to go ahead and arrange it. I did, with the help of a few others, and soon we had a good plan, charts, schedules, and everyone seemed enthused. Our manager filed one release at the beginning, but then she claimed to be unable...
Dear Doormat:

If it could make any difference, I would apologize to you on behalf of managers everywhere. But the kind of behavior you mention isn’t bad management. It is just bad. There is, unfortunately, no ready-made solution for dealing with people who behave unethically. “Unethically” is itself a bit of a cop out. Lawyers, doctors, business executives, ministers, and librarians who cheat, lie, or steal are said to be unethical, and part of the solution has been to require courses in ethical behavior and to establish codes of professional conduct. Different levels of unethical behavior result in different penalties: a reprimand, temporary suspension, disbarment, prison. But in law offices, in medical research facilities, in businesses everywhere you will find incidences like the one you describe. Insinuation, nods and winks, tone of voice – there are thousands of ways to belittle, lie, and generally treat people badly without violating in a technical sense the rules of behavior implemented by a professional organization. Not every example will be as clear-cut as the one you give. Credit stealers are usually sneakier than that. One is tempted to suggest that if someone needs a course in behaving at a minimally ethical level after one has reached the age of obtaining a degree in law, medicine, or library science, there is probably not much hope for such a person. So, I don’t hold out much encouragement for changing the internal disposition of your boss. But, that does not mean there are no ways to change the actions of such people.

Are there any advantages to the rules-oriented approach to ethics? On the one hand, there are sometimes acceptable methods for dealing with ethical lapses within organizational policies. If, for example, your boss is a member of the American Association of Law Libraries, she is theoretically operating under that organization’s “Ethical Principles” <http://www.aallnet.org/about/policy_ethics.asp>. Unfortunately, nothing there contemplates generally bad behavior. A professional organization is appropriately more interested in laying out the rules for behavior within the specialty over which it has an interest. So there is much in AALL’s Ethical Principles concerning the appropriate dissemination of legal information and nothing about how generous, kind, and hard-working members should be. And really, AALL has enough to do working with the profession’s inherent needs. No one expects more. Like all organizations, and like all workplaces, families, and societies, one needs to be able to rely on the basic forthrightness of the majority of its members in order for anything to get done.

So what is to be done? I think a memo which simply states the facts of the case, without saying that your boss behaved badly, should be composed. As well as you can remember specific dates, actual words used, processes, etc., you should spell them out plainly. Who is your manager’s boss? The library director? The dean of the law school? Whoever it is, make an appointment to see him or her. Give that person a copy of your memo and a copy of the story in the newsletter. Say that you just wanted to let that person know that the
implication in the newsletter — that the staff were somehow uncooperative or unconcerned with the backlog — is not at all how the staff felt. Don’t demand anything, don’t imply any specific action. Let the facts speak for themselves. You will have done your duty in passing appropriate information to the next level of management. This may be a brave or foolish thing to do depending on the relationship between your boss and her boss. If they are very chummy, it may only get you into trouble, in which case you should forego the procedure. But if her boss is a reasonable person, he or she will understand what is behind the dissatisfaction you and the other staff are feeling. Alternatively, you could directly ask your boss about the newsletter story. Is she completely reprehensible? Is there room for reform? You will have to make that judgment. You could bring a copy of the newsletter story and ask her why the reporter seemed to have the impression that the staff were unenthused about the project. This could of course produce a lot of double talk and excuses, which will only sink her further in your estimation. But it might also reveal to her that she’s not so clever as she thinks; that there are people around her who know what she’s up to and that she’ll have to watch herself. Whether that goes on to produce a change in her behavior is anyone’s guess. It may be worth a shot.

Dear Miss Manager:

I have an embarrassing issue to raise. What am I to do about a new employee who is, to be honest, a bit pungent? Actually, this employee downright stinks. That may sound harsh, but it is only too true, and it has reached a crisis point, mostly because of the way other employees are reacting to it. The issue has gone beyond the unpleasantness and distraction of the offensive odors themselves and has become the chief topic of conversation throughout the day, and the fuel for innumerable jokes and cutting remarks directed at the offending employee, who seems to be as oblivious to the comments as to their inspiration. And now it has turned more serious in that another employee is suffering fairly acutely from allergic reactions she believes emanate from the particular quality of the odors in question, which originate, it seems safe to say, from the new employee’s apparently prodigious menagerie of pets.

Sincerely,

Suffering so far in silence

dear silence:

As embarrassing as such an issue is to relate, and as truly embarrassing as it will be to deal with, something clearly must be done, embarrassing or not. Your first order of business is to make sure you have your facts straight. It may seem ridiculous to question whether or not the employee really smells bad; I’m assuming that must be incontrovertibly true and not just a bit of whimsy that started with a mild offense and has been blown out of proportion. But make sure this is the case. There are people in the world who do not tolerate anything that doesn’t meet with their own sense of propriety (Miss Manager herself has had such accusations leveled against her!) If the new employee is a bit out of the ordinary and doesn’t fit into some other employees’ range of acceptable odors, but is not really so egregious as the ensuing jokes and commentary imply, then your real problem may be with the rest of the staff. That, of course, would be another whole topic, so I will assume that is not the case here and that you really do have a verifiable, “reasonable man”-defined smell to deal with. And I will assume that your conjecture about its origins in the employee’s pets is also true, although again I would caution you to be sure about that before you begin any actions.

Now, what you have is an employee who, because of some personal behavioral choices, is unpleasant for other employees to be around and is thereby disrupting the workplace. In other cases of inappropriate behavior, your actions would be more obvious. If the new employee were using the phone too much for personal calls or taking hour-long mid-morning breaks or displaying pornographic images in the work area, you would have a clear line of action, probably backed up with a written policy from the personnel office. In this case there may be no specific policy that covers the exact problem. But read the policy anyway. There is undoubtedly some generic, catch-all provision that will be useful in the present case. Something appropriate may reside in a dress code or appearance provision that says an employee should be neat and clean. These kinds of documents have a very wide range of expression depending on the nature of your institution: business or university, state institution or private, etc. Union provisions in particular may complicate the procedures you have to go through in case like this if it is pursued based on official documentation. And this does not at all contemplate the possibility of legal action. If all of
This seems like an extreme caution in a case like this, I assure you that there are places and circumstances under which such caution is necessary. It would be best if this kind of situation could be handled unofficially as much as possible. If it becomes necessary at some point to go to official documentation or institutional rules to make a demand for change, you should know what you have to go on. But don’t begin there.

It would also be unwise to start with threats or bombastic demands. This will be embarrassing for you, but it will probably be even more embarrassing for the employee in question. Delicacy is essential. The question of the employee’s feelings in the matter should never be forgotten. Assuming that the employee is performing in his or her job appropriately, the issue of the offending odor should be separated from the essential elements of the job as much as possible. But don’t be too circumspect. At some point, and the sooner the better, the actual problem must be dealt with directly. A sample script for a manager in such a situation (and I think the odoriferous employee is analogous to other sorts of behavioral/personal situations that might arise) might go something like this:

“Ziggy, I am quite pleased with your work. You are doing a good job. But there is something that is troubling me, and I’m hoping you will be able to help me. To be honest, Ziggy, many people in the department have been quite bothered by the animal smells that seem to attach to your clothes.” [If possible, make the actual accusation or problem to be dealt with as impersonal as possible, at least initially. In this case, a problem with someone’s clothes may seem less offensive than a problem with his body, as it were] “I understand that you have a lot of pets.” [Here an invitation to talk about the animals or some personal matter in a positive light would be good to initiate if possible. Once the essential topic has been broached, it is a good idea to veer off of it for a short time so that the employee knows what is at issue but is not immediately called upon to explain or defend anything. Also, a short, pleasant, slightly off-topic conversation at this point will lessen the sense of severity in the conversation without necessarily diminishing the importance. Don’t let this sidebar go on too long, though. Sooner or later, you’ll have to get back to the crux of the matter.] “So, Ziggy, to get back to the issue of the clothes, I’m hoping you can help me think of a way to alleviate this problem.” [Something like this will allow the employee to begin discussing the problem, and from here your response will depend on the employee’s reaction. Ideally, he will say “I had no idea! I will immediately make changes!” This, however, is not likely. Be prepared for a certain amount of denial, defensiveness, and distraction. He may assert that people don’t like him and are ganging up on him, that he has a right to have a hundred and eighty cats, etc.] “I’m sorry you feel that way, Ziggy, but the problem is real and it is up to us to figure out a solution. We work in an indoor environment here, and it is essential for everyone to be able to work closely with one another. A couple of years ago, there was an employee in another department who wore too much perfume and caused other people to avoid her. Once she was told about how her perfume was causing trouble, she scaled back and everyone was happier” [Offering an example that makes the employee feel he is not the only one to be singled out might not be a bad idea. If the employee has not shown any signs of a willingness to change by now, pull out the stops a bit.] “The fact is, I have to trust my own judgment and that of the majority of the people in the department and say that you must come to work in a cleaner state, for your own sake and for ours. The Personnel Office requires it, and so do I. I expect there to be immediate improvement in this.” [Don’t threaten any specific consequences yet. This is as much as you can do in a preliminary meeting.]

If the employee is still defiant or unwilling to improve after this, then you have a decision to make. Is the behavior bad enough to warrant further action? If so, you will want to discuss the issue with the next level of management before you proceed. It will be a good idea to discuss the case with your bosses to make sure that you can count on them to back you up. But most employees aren’t looking to get fired. Things may be a bit rocky at first after this initial meeting, and there may not be 100% compliance right away, or things may slip back to the old ways after some initial improvement. Be prepared to be vigilant and to return to the topic if necessary. Recidivism in itself could be grounds for further action, if things get to that point.

This will be a painful operation, and it will require great tact and kindness to be successful. This is the kind of situation that separates the real managers from the clock-punchers. Good luck!
As I write this at the end of January, the annual meeting is still over five months away. However, the work and planning for the meeting have already begun. The OCLC Committee will meet on Monday, July 22, from 7:00-8:00 AM. I have been in contact with OCLC about arranging a speaker for the meeting. I hope that many of you will be able to attend. There will be more about the annual meeting in the June issue of the newsletter.

OCLC Committee Website

In October and November, there was a discussion on the Online Bibliographic Services electronic list about the OBS website. The consensus was that the standing committees should develop their own web pages with relevant information. This is consistent with the new OBS strategic plan for 2001-2004. Under Strategic Directive #2: OBS Educates; Outcome 2b states “OBS will maximize all available resources and seek to develop new ones in order to contribute to the continuing education of its members.” One of the initiatives under this is “Review and completely revise the OBS Website by Spring 2002. Provide new educational content, including (but not limited to): links to relevant OCLC, RLIN, and local systems Websites…” In accordance with this initiative, a special ad hoc committee has been discussing and developing the OCLC Committee’s website. The committee, consisting of Ellen McGrath, Sally Wambold, and myself, has thought long and hard about this, and we have become the best of email pals. We are continuing to discuss and design the web page—this is a very exciting development for the OCLC Committee and OBS, and one that we hope will become a valuable resource to other OBS members and OCLC users. Watch for the announcement of its launch later this spring.

New Interface Migration

OCLC continues to progress on the transition to the new, single integrated interface. The guide to migration on OCLC’s website has been revised to reflect the latest progress and new developments. OCLC is still on schedule for the first release of the new interface in July, with Passport being supported through December 2002. Passport will cease to be operational after December 31, 2003. Depending on when the new interface is released, we may have a hot topic for our open discussion in Orlando.

I would strongly urge you to look at the revised migration guide on OCLC’s website. It is located at <www.oclc.org/strategy/cataloging/guidetomigration.pdf>.

OCLC Annual Report

OCLC has issued its 2000/2001 Annual Report. It is available on OCLC’s website or by contacting OCLC and requesting a copy. It contains Jay Jordan’s report to the membership in which he has a lot to say about WorldCat, OCLC governance, collaboration, and the like. However, I believe that his most significant statement is under the topic of innovation. In his discussion of OCLC’s decision to scrap its proprietary software in favor of Oracle database technology, he states “as we seek to become more agile in a web-based world, we will look to outside solutions when they make economic and technological sense.” [p.3] I would argue with his contention that we are in a “web-based world,” but this does show a continued evolution in OCLC’s thinking and methods. This is nothing new—when I first started at Indiana University over 13 years ago, we had two OCLC-dedicated M300 double 5 ¼” disk drive machines and two M105 OCLC-dedicated dumb terminals (remember those terminals—to get a record to display you had to press two keys: [Display Record] and [Send]). One of my first tasks related to OCLC was to read and evaluate a packet that OCLC had sent out titled “Communications & Access Planning Guide,” which discussed the changes in the communications system and the end of the M10x machines (I still have the packet in my files). I remember attending a meeting sponsored by our local network where an OCLC representative talked about
these changes and made the comment that he felt that OCLC had done the membership a disservice by selling computers to libraries for accessing OCLC. He thought that OCLC had held libraries and the system back by trying to save the membership money, but in the process had prevented innovation and development. Of course, back in those days no one had even heard of the Internet or the World Wide Web, but his comments resonate with me today. The pace of change at OCLC has quickened (along with most everything else in our world it seems), with the development of CORC, Dublin Core, FirstSearch, and the new interface. I believe that we will continue to see new developments at OCLC and a continued evolution of the system, and we must be prepared to adapt and change as OCLC changes.

Please keep in mind the open discussion meeting in Orlando in July— I am sure that we will have a lot to discuss.

What does beta testing mean? Basically, it means that you are being the guinea pig for a new version of a system or software. The vendor is hoping you will find the bugs that they should have found when they originally tested it.

I spent the last two months of 2001 attempting to get a beta version of our catalog system to operate. This meant hours of interaction between the vendor and myself. Here I offer some helpful hints that arose from this experience:

1. Never attempt even a minor update without a guaranteed full backup within your reach. We needed to use it. We were fortunate because the regular backup had, unknown to us, malfunctioned. If I had not insisted on an additional backup, we would have lost more than one day’s worth of data.

2. Arrange to work locally with a consistent group of people. This way you do not waste time repeating what had happened in the past. This is also important because if you need to spend numerous hours on this project, the same person may not always be available at the vendor’s end.

3. Review all documentation carefully and make sure that your server is able to accommodate any increases to disk space, etc. Nothing is more frustrating than getting part way through the update only to discover that you cannot finish it. One of their other clients did not check space beforehand and only got 75% through the installation.

4. While performing the update, if there is any confusion or inconsistency in the instructions, contact the vendor’s Technical Support immediately. Do not assume that you know what they mean.

5. Prepare lots of material to read or work on while it is processing during the upgrade. While it is processing, you need to keep yourself constructively occupied.

6. Make sure that you know how to contact your local Automation personnel if the upgrade develops a problem. They should have the ability to remote access into the server and resolve the problem for you.

7. Make sure your stress toys are close at hand at all times.

8. IF you are allowed to be in your server room, wear warm clothes and have additional warm clothing available. The longer you are in there the colder you will get.

9. Maintain your patience if and when problems develop. Venting your frustration at the vendor’s personnel will just delay the resolution of your problems.

10. Maintain a detailed list of changes that you notice after the upgrade. Beta testing means that you are willing to do in-depth testing. Hopefully, your efforts will result in fewer problems for other users of the software. Make sure that you indicate which changes have improved the system and which ones need further improvement.

If anyone wants to be a guest columnist, please contact me at: betty.roeske@kmz.com.
At a web site called ACI Plus <www.aci-plus.com> (created by Dr. Daniel K. Berman) there is a page titled “The Single Greatest Secret to Good Writing.” The secret is: At its best, all writing -- any type of writing -- is storytelling. There is on that same web page, a list of 10 principles of good storytelling. Many of these points are valuable, if nothing more than as reminders to review before you launch off to write that article or book. The 10 principles (they have them in the form of questions which you’re supposed to answer yes or no), are listed below in the same order they have on the web page, however, I’ve tweaked them for this column’s readership. [Yessss, I got permission from Dr. Berman to do this.]

The 10 principles are:
1. The opening sentences catch a person’s attention,
2. The narrative is clear and to the point,
3. The material is presented in a logical manner,
4. The writing has a clear beginning, middle and end,
5. Content is easy for the reader to follow,
6. The author has put himself or herself in the reader’s place,
7. The content is interesting enough to make the reader want to read to the end,
8. The main point of the “story” is obvious,
9. The conclusion satisfies the readers, rather than leaving them confused or “hanging,” and
10. Readers who have read the content are likely to tell it to others.

I like the notion that what we write is similar to storytelling. Have you gone to a conference lately? Did you strike up any conversations with colleagues and wish someone would write about those topics? That someone can be none other than you. Where do all those post-conference ideas go? More often than not, they go nowhere. There’s no place to put them so they slip-slide out of your mind, perhaps dropping out of your mental notebook or briefcase like autumn leaves to be carried along the curb, later to be swirled away down the sewer. Yes, I’ve painted a horrific picture. Ideas are a terrible thing to waste. But it doesn’t have to be this way— Catch those idea-leaves!

If you’ve been reading this column regularly, I bet you’ve made your very own PIF (Publication Ideas Folder) by now. You probably didn’t assign a “name” to this file, so I can help you out with catchy buzz-word for it. PIFs are great things to keep nearby. PIFs are not effective if you put your PIF with other folders in your file cabinet or inside your desk drawer with other folders you seldom use. Some of the more technologically-addicted may not prefer the “Folder.” But we still have PIF C Publication Ideas File (heh-heh.)

A desktop item, of course. Not buried somewhere in your network neighborhood or c-drive.

Ideas for an article or book are ubiquitous. You just have to notice them. They are like dandelions or house sparrows. They are everywhere most all the time, you just need to become aware of them and then the trick is when you notice one, you have to JOT THEM DOWN immediately. Jot, I said... don’t get bogged down mentally by thinking you have to write up a formal sentence or two for an idea. Just jot down a word or two on any slip of paper and put it in your PIF. When you find time to write up something more substantial about your idea/s, you’ll have them in one handy folder. The techno-potential-authors can jot down their idea/s quickly using their PC’s “notebook” or on a Macintosh, you can use the neat “sticky” applications.

I just said “When you find time to write...” Are you going to “find time to write?” Probably not. Time to write isn’t normally available for us. It’s just not there. It’s like having “time” available to volunteer for professional committees, or offices in AALL or volunteering to help in AALL chapters, or helping in AALL SISs. There simply isn’t time for those activities either... but, people are doing it anyway, aren’t they?

I understand. When you start thinking about publishing, it may remind you of thinking about trying out a new recipe, or when thinking about whether to go to some new restaurant in town. An instant and subtle mental barricade is formed: yes, it’s far easier to just keep doing the safe--the familiar-- rather than it is to think about what all is involved in getting the ingredients of that new recipe or taking a chance on going to
that new restaurant and possibly being disappointed at having a lousy meal and having wasted the money for something you didn’t enjoy. I’m writing all this, hoping to get you warm to the idea to actually start writing to get published. Heck, your article doesn’t have to be very long either. For example, page 310 of volume 50, no. 2 (June 2000) of the Journal of Legal Education, Professor Grant H. Morris wrote two words and one footnote to those words in his now-famous article titled “The Shortest Article in Law Review History: A Brief Response to Professor Jensen.” No, I’m not telling you what those words are!— you have to do a little research to find those two words he wrote.

Capital Community College (Hartford Connecticut) has a very nice web presentation titled “A Guide for Writing Research Papers.” It’s geared for undergraduate students, but is a nice place to begin your journal for researching on your path to getting published. The URL is: <http://ccc.commnet.edu/mla.html>. This is part of a larger web page titled “Internet Resources for Writers” which is also quite good as a starting point.

Hey--Publishing opportunity right here!! I need some help with the next few “Research & Publications” columns. I’m on AALL’s AMPC for 2003 Seattle, and I’m going to be busy with that commitment for the next several months. If one of you could write some guest columns, that would be wonderfully excellent. Otherwise, the next several columns will be... will be... well, let’s not go there. So please, call or e-mail me. We can go over some ideas for future columns.

Another publishing opportunity is that LLRX.com is looking for potential authors. The purpose of LLRX.com is to provide our readers with a dynamic forum in which to exchange information... on a broad range of topics including: technology and legal research; Congressional activities affecting technology, research, and libraries; technology training resources; and, seminar materials and presentations from leading legal and library-related technology conferences.” They also are a forum for unbiased reviews of: software and online legal database services, resources for intranets, and books on technology topics. Contact them at: <editors@llrx.com>

Cynthia Cicco (U. of Pittsburgh Barco Law Library) forwarded me an “ACQflash” e-mail in early February 2002 that announced an exciting new research forum for acquisitions and collection development librarians. You may have already heard about it, but in case you haven’t, it’s called CAROL. Collections and Acquisitions Research Online is an information clearinghouse for library research. It’s a web database where librarians can go to send a description of their research to locate other researchers active in a similar topic. The purpose of CAROL is to encourage research by providing a central source of information about ongoing work. For more details launch to: <http://128.253.121.98/carol/start.html>.

Library research: are you interested in diving into it? Try this URL: <www.dpo.uab.edu/~folive/LRSII/>. Someone could write a guest TSLL Research and Publications column on this web site alone! Or how about writing an article based on an article by Peter Jacso “Digital Librarianship: Librarians as Digital Authors and Publishers” published in the May 2001 issue of Computers in Libraries.

If you are new to tech services law librarianship and don’t know about Ellen McGrath’s now-famous CPOEAS (Current Publishing Opportunities Email Alert Service), contact her at <emcgrath@acsu.buffalo.edu>, and she’ll add you to her address book. I wish we could name it COPIUS, but it just wouldn’t work as an acronym. Thank you Ellen for continuing your volunteer activities for this service!

Here are some recent publishing activities of our colleagues that I know about. If you or someone you know should be included in future columns, let me know please. Patricia Turpening (U. of Cincinnati) submitted an article for publication in the May or August LLJ volume titled “Survey of Preservation Efforts in Law Libraries, with Recommendations.” Pat has also published an article in the April 2002 issue of Spectrum, in the Professional Development Desktop Learning Opportunities Series, on starting a preservation program. Janet McKinney (Shook, Hardy, Bacon-Kansas City) wrote an e-article “Shaking up Shook: A Case Study in Implementing LawPort Portal” in the February 1, 2002 LLRX.com web site (to read, go to: <www.llrx.com/features/lawport.html> then do a web home page search under Janet McKinney). Janet told me that she was asked by the vendor (SV technology) to do the article. Marlene Bubrick (Loyola-Los Angeles) wrote “A Technical Services Link to Public Services Staff” in the Spring 2001 issue of Academic Law Library Newsletter.
Spectrum regularly to tap into the various grant money that’s available. Money for research is available from OBS and TS through the OBS/TS Joint Research Grant Committee, of which I am the chair. Other current members are: for TS-SIS, Julie Stauffer and Rosemary Hahn, and for OBS, Ruth Patterson Funabiki and Elizabeth Duncan, and advisor is Richard Amelung. In a nutshell, you can go to either TS or OBS web sites and find forms to fill out for the Joint Research Grant. We have “plugged” the purpose and policies of this fabulous grant opportunity in past TSLLs, so I won’t go into details. Contact me and/or poke around either SIS web sites to find all the info you need to start thinking whether you want to apply for a grant for a special research project you want to get off the ground.

LRTS is issuing a call for original, unpublished manuscripts. It’s a marvelous opportunity to report research results or other scholarly activity among our non-law library colleagues. LRTS is Library Resources and Technical Services, the official journal of ALA’s ALCTS (Association for Library Collections & Technical Services). They are a very large, very active organization. They have a web site called “ALCTS Research Topics in Cataloging and Classification: a Summary of the Literature, 1995-”. It’s packed with all kinds of research ideas. To get to it, just do a Google search with the terms ALCTS research topics. Have fun!

Midwinter ALA 2002 in New Orleans was disappointingly cloudy and cool — mostly in the fifties — but the serials meetings were Cajun-hot!

Serials Cataloging Issues:

First off, AACR2 will be revised and published this summer. We’re told that it will be an entire new revision of AACR2 (the last was called “second edition, 1998 revision”). Our Chapter 12 will not be published separately. The revision will be in a ring-binder. ALA Editions plans to issue a new annual revision each year. You will also be able to purchase and download update pages, although it’s not clear whether they will file readily into the 2002 volume. During the Midwinter conference, ALA solicited opinions informally on a survey form about the means of updating, so that may not yet be settled. The CONSER Editing Guide and the CONSER Cataloging Manual are being revised, and will be available late in 2002.

The Continuing Resources Chapter 12 will cover: serials, integrating looseleafs, updating databases, updating Web sites, integrating electronic texts that are revised, and reports of an event even though those are finite. Here’s the new definition of a serial: “A continuing resource issued in a succession of discrete parts, usually bearing numbering, that has no predetermined conclusion.” One big difference here is that a title without numbering can now be considered a serial. Much of the content of Hallam’s Cataloging Rules for the Description of Looseleaf Publications will be part of AACR2. Although description of serials will still be based on the first issue, or the earliest available, description of integrating resources will be based on the latest available. When a change occurs to an integrating
resource, we will change its description and put earlier information into notes or other fields, as we do now with loose-leaves; we will not make a new record for the changed integrating resource. A representative from LC stated that because LC’s loose-leaves are often not updated, we should send change information not to LC but to BIBCO members — librarians who can consult the item and make changes to the record.

The major changes to the MARC Bibliographic Format include:

1. the value of “i” for “integrating resources” in BibLvl (leader/07)
2. the value of “2” for “integrated” in successive/latest entry value (serials 008/34 and 006/17)
3. a new use for the 247 “former title” field for integrating resources that change title, which formerly had to be placed in title history” notes
4. repeatable 260 fields, for publisher changes for integrating resources — the kind of information we’ve replaced and squeezed into notes in the past

The Library of Congress plans to implement Chapter 12 no earlier than September 1, 2002. Both OCLC and RLG reported at the Committee to Study Serials Cataloging meeting that they will try, but may not be ready to implement Chapter 12 by the time of LC’s planned implementation in September. Unfortunately, both utilities are involved with major reorganizations of their databases right now, which delays their full attention to Chapter 12 changes. If the utilities are not ready to accept records with BibLvl “i,” LC will distribute records for integrating resources such as loose-leaves temporarily as BibLvl “m.” OCLC stated that it will later try to convert some records automatically to BibLvl “i.” Members may have to convert other records with the piece in hand.

Training for the new rules will be available from various sources: CONSER’s SCCTP basic serials cataloging course will be revised; its advanced cataloging course is being developed now and should be available in July 2002. Training sessions will be provided at the NASIG conference in the spring of 2002, and at ALA in June, at the Monday afternoon meeting of the Committee to Study Serials Cataloging. Could someone offer a training session during the July AALL conference?

Beyond the changes at the Library of Congress and the utilities, we must each find out how and when our local system vendors are implementing these changes. Some local systems may allow you to add new fields and values to your MARC tag tables, which will allow you to update your system when you want to. Your local system administrator and your vendor will know whether you can do this.

The ISSN Manual is being revised to be in harmony with AACR2 Chapter 12. It may be published by the end of 2002. ISSNs will be assigned to more kinds of material: selected integrating loose-leafs, selected updating databases, and to selected integrating web sites, in addition to all traditional serials. An unresolved problem is the assignment of ISSNs to integrating resources, such as Web sites for periodicals which change title.

Why do we care about the ISSN Manual? Because the more compatible ISSN serial records are with AACR2 serial records, the more we can use those records. ISSN (or NSDP) serial records are created in the United States by the National Serials Data Program, within the Library of Congress. NSDP serial records are created early in the life of the serial, often before it is published. Those records are distributed to bibliographic utilities, etc., with other bibliographic records from LC. Increased compatibility will allow us to use these NSDP records for acquisitions and for cataloging, without having to rework them later. And if ISSNs are assigned to more kinds of material, we will have more early NSDP records to use.

SISAC, SICI and ONIX:

The Serials Industry System Advisory Committee (SISAC) met at Midwinter, after a gap of three years. In 1998, SISAC and the Book Industry Systems Advisory Committee (BISAC) were merged, and are now known as BASIC (Book and Serial Industry Communications). It was decided that SISAC will continue to exist as a subcommittee within BASIC.

SISAC created the Serial Item and Contribution Identifier (SICI) and its bar code, which includes coding of the serial’s ISSN, used to identify issues of some serials. The NISO SICI bar code standard is due to be re-evaluated (you can download it from www.niso.org). SISAC was involved with the review. Within law collections, has anyone had experience with using the SICI to check in serials? From what I’ve seen,
few enough of our titles have ISSNs, let alone SICI bar codes. Since looseleafs can now have ISSNs, and serials (including law reviews) always could have had them, this may be the time to start to push for more ISSNs on our titles. ISSNs, with SICI bar codes, could make titles easier to find in our serials control systems, and speed up our serials checkin.

I’ve wondered whether a committee at AALL would like to initiate an effort to get our law reviews, published at our own law schools, to sign up for ISSNs. The ISSN form is on the Web at <www.loc.gov/issn>, and isn’t hard to fill out. There is no charge for an ISSN. Could we talk about this in July in Orlando?

At the SISAC meeting, we learned that the ONIX (Online Information Exchange) communications format now has a draft of formats to carry serials information; ONIX was originally only for books. Two draft formats exist now: one for Rich Catalog Information from Publishers — more than our normal AACR2 catalog record, the other, the ONIX Serial Item record, is the proposed ONIX format which is intended to support alerting, dispatch and library checkin functions. An ONIX Serial Item record may pertain to an issue or an article or an update. A record for holdings information is to be developed in the future. Information about the ONIX serial records is on the Web at <www.editeur.org>. This effort is just beginning; it’s a long way to implementation by our serial publishers, serial vendors, and local systems.

I’ll write more about ONIX for serials in my next article. Meanwhile, may I announce that I have been appointed AALL’s representative to BASIC, and need to hear from you to provide input to this and SISAC and BISAC’s many initiatives.

**Publication Pattern Initiative:**

The Publication Pattern pilot project will end in June, but contributors say they plan to continue to input patterns. One sign of success is that contributors say that when they retrieve an OCLC record to input pattern information, someone has often done it already. Have we seen 891 fields in law material, or is that an area we should begin to work on? You don’t have to be a full bibliographic CONSER member to do this.

The temporary 891 fields in OCLC that now contain pattern data will continue to exist for the time being. In a few years, when OCLC will have developed a properly-coded place for holdings information, the pattern data would be able to move there, but nothing is definite at this time. The OCLC macro which makes it easy to create 891 pattern fields will be revised for use outside OCLC’s Passport software, which is being replaced in the next few years. The macro will also be available in OCLC’s Cataloging MicroEnhancer software in the future.

Two local system vendors, VTLS and Innovative Interfaces, have already provided ways for users to load this data into serials control records and use it to create pattern information to drive prediction. At least one other vendor is working on it. Others have found that they can copy-and-paste the information into their local system’s MARC pattern field. The Publication Pattern Task Force is working on this with vendors. We hope that users — a much more powerful voice than any committee — will also urge their vendors to make it possible to load pattern data.

Toward determining the future of the pattern project, surveys will be sent to pattern contributors and to CONSER members. The present contributors are being asked a few questions about the experience, whether they are willing to continue to contribute patterns, and about the future of the Initiative, the future for the pattern data, and about their local systems’ use of pattern data. CONSER members are being asked about their possible participation, and about their perception of the Initiative and the pilot project. The Task Force will meet again in June to determine next steps, but it is clear that the database will not disappear, and the Initiative will continue, in some form.

I’ve raised some questions in this article, and I’d like to hear from readers. Please write me at erapp@mail.als.edu. As they say in New Orleans, let the good (serials) times roll!
The following serial title changes were recently identified by the University of San Diego Legal Research Center serials staff and the University of California, Berkeley Law Library cataloging staff:

**Ad rem**
- Vol. 9, issue 4 (2001)  
  (OCoLC 29449195)  
**Changed to:**  
  ILSA quarterly  
  Fall 2001-  
  (OCoLC 48226796)

**Annales de l’Universite des sciences sociales de Toulouse**
**Changed to:**  
  Droit ecrit  
  No. 1 (mars 2001)-

**Case commentaries and briefs**
- Vol. 1, no. 1 (July 1981)-v. 21, no. 4 (Apr. 2001)  
  (OCoLC 7674012)  
**Absorbed by:**  
  The prosecutor  
  Beginning with the v. 35, no. 3 (May/June 2001) issue  
  (OCoLC 5095734)

**Computer Law Institute (University of Southern California. Law School). Annual Computer Law Institute**
- 17th (1996)-20th (1999)  
**Changed to:**  
  Computer and Internet Law Institute  
  21st (2000)-

**Eco-notes**
- Vol. 1, no. 1 (fall 1995)-v. 3, no. 1 (winter/spring 1999)  
  (OCoLC 34335251)

**Changed to:**  
  International and comparative environmental law  
  Vol. 1, issue 1 (fall/winter 2000)-  
  (OCoLC 47124235)

**The journal of real estate taxation**
- Vol. 1 (fall 1973)-v. 28, no. 4 (summer 2001)  
  (OCoLC 1792269)  
**Changed to:**  
  Real estate taxation : RE  
  Vol. 29, no. 1 (4th quarter, 2001)-  
  (OCoLC 48491477)

**Law journal (Brisbane, Qld.)**
  (OCoLC 14367218)  
**Changed to:**  
  Law and justice journal  
  Vol. 1, no. 1 (2001)-  
  (OCoLC 48385418)

**Loyola intellectual property & high technology law quarterly**
- v.3, no. 1&2 (spring/summer 1998)  
  (OCoLC 37728207)  
**Changed to:**  
  Loyola University New Orleans School of Law intellectual property & high technology journal  
  3:1 (winter 2000)-  
  (OCoLC 47631801)

Vol. 3 is repeated as first vol. of the new title (winter 2000) and last vol. of previous title (spring/summer 1998)

**Mediation quarterly : journal of the Academy of Family Mediators**
- No. 1 (Sept. 1983)-no. 24 (summer 1989);  
  v. 7, no. 1 (fall 1989)-v. 18, no. 4 (summer 2001)  
  (OCoLC 9728166)  
**Changed to:**  
  Conflict resolution quarterly  
  Vol. 19, no. 1 (fall 2001)-  
  (OCoLC 47734287)

The following serial cessations were identified by the University of San Diego Legal Research Center serials staff and the University of California, Berkeley Law Library acquisitions staff:

**Foreign policy bulletin (Washington, D.C.)**
  (OCoLC 40625928)  
**Ceased in paper format; subsequent issues to be available online (see OCoLC 41902232). For more information, go to <http://www.rlg.org/r-focus/i53.html#subscribe>

**Clarification:**  
From the Dec. 2001 column, the Weekly compilation of Presidential documents has not ceased print publication entirely. It is now only available in print via subscription from the GPO sales catalog. It ceased being distributed in print to depository libraries with the Oct. 30, 2000 issue; it is searchable online at the GPO Access website.

We had a question from a reader about what sources we use to compile the serials changes in each column. Basically, we include items that we have handled ourselves. We also rely on information provided by our co-workers, government offices, our subscription agents, and keep our fingers crossed that the information is correct. And we rely on you, our sharp-eyed readers, to let us know if we’ve made a mistake or if there’s an upcoming title change we need to watch for. So please, keep those emails coming!
ex-officio members from the Library of Congress and the National Library of Canada. The other official participants in the meetings are representatives and liaisons to the U.S. MARC Advisory Committee. These include ALA representatives from groups such as CC:DA, SAC and the Public Library Association; bibliographic utility representatives from OCLC, RLG, and A-G Canada; national library representatives from the Library of Congress, the National Agricultural Library, the national Library of Medicine, and the national libraries of Canada and Australia; and finally liaisons with other non-ALA organizations. This is where I fit in, along with representatives for audio-visual catalogers, system vendors, music librarians, archivists, and more.

The MARBI meetings are open meetings. Interested people are invited to attend and encouraged to participate in the discussions. Diane Hillman, our own MARBI Representative from 1989-1995, is a very active and respected participant. Even though she left her law library, she is still looking out for our interests. In New Orleans, she reminded the group that they still had not added the section symbol to the MARC character set, a cause she has championed for years. In addition to Diane, our own Ellen Rappaport, who describes herself as a MARBI groupie, spoke up about MARC Holdings issues. I also saw a few other law librarians in the room, and encourage you to attend MARBI meetings if you get a chance.

MARBI meets for three half-day meetings during ALA and ALA Midwinter. Proposals and discussion papers are presented and considered at these meetings. Proposals can be approved, rejected, modified, or returned for further revision. Discussion papers are just that. Their purpose is to define the concerns of the group and assist with the drafting of proposals for future meetings. Once a proposal is approved, it must still be implemented by the national libraries, by the utilities, and, hopefully, by the local system vendors. Proposals, discussion papers, minutes, and more are available at <http://www.ala.org/alcts/organization/div/marbi/marbi.html>.

A Newcomer Goes to MARBI

During the trip to New Orleans, and my first round of meetings, I was nervous about the intimidating group that I was to join. I was an outsider, since most of the participants are librarians who have known each other and worked together on ALA tasks for years. But many of them welcomed me warmly. While reading the nine proposals and seven discussion papers for the meetings, I marveled at their detail. The discussions were often fascinating and were continuously grounded in the theory behind the details. Before the meetings it seemed that attending three 3 ½ hour meetings would become tedious, but in reality the time passed quickly. You probably will not believe me, but I was a little disappointed that some of the discussions were not longer! While I am still in awe of the group of participants, I look forward to ALA in June, with its three 3 ½ hour meetings.

Since I was just getting my feet wet at this round of meetings, I was glad that there was little in the proposals/discussion papers that was of particular interest to law librarians. One proposal did mention loose-leaves. The issue in question was part of Proposal no. 2002-03, made at the request of OCLC/CORC. It added new subfields to field 046, including one for date modified. It was specifically designed to meet the needs of creators of Dublin Core records that contain dates with no place to go in current MARC records. This could
concern law librarians since loose-leafs are now under the umbrella of integrating resources along with electronic resources. (See below.)

The proposal specifically stated that this subfield would not be used for changes to loose-leaf publications. I solicited feedback about this from law librarians on the TS-SIS and OBS-SIS discussion lists. Rhonda thought this field could be valuable if used to record the date when changes in the record were made by a librarian who had seen changes in the work. But the intent of this proposal is that this date could be for any change, not just one that caused a revision to the bibliographic description. Most of you who responded to my e-mail were very definite in your opinion that you did not want to include loose-leaf dates modified in bibliographic records. The MARBI group did not see these subfields as having any usefulness outside of CORC.

Thanks very much to all of you who responded to my e-mail. I was surprised and heartened by the number of you who did. I am counting on you to let me know how you want me to represent you. Hopefully we will have some good debates about MARC issues that directly affect our work.

Change Is in the Air

Two proposals of importance to law librarians were approved last June. During AALL Rhonda described them to us in her MARBI Report <http://www.aallnet.org/isis/tssis/commrept/2001/marbi2001.htm> and in a seriality program and roundtable discussion. If you missed the roundtable, you missed one of the liveliest meetings I’ve ever participated in at AALL! Proposal 2002-04 makes the 260 field (Publication, Distribution, etc.) into a repeatable field and provides a means for coding earliest, current and intervening publishers.

The second proposal, Proposal 2001-05, provides a new bibliographic level code for integrating resources. It also provides new coding for describing their serial-like aspects. An integrating resource is described as “a bibliographic resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole. Integrating resources may be finite or continuing. Examples include updating loose-leafs and updating Web sites” (p.2 of proposal). What a huge change! Finally we will have a means for cataloging loose-leafs without forcing them into a monograph shape.

Since last summer, both proposals have advanced towards reality. They are included in the October 2001 update to MARC 21 Format for Bibliographic Data. Just because they appear in the Format does not mean that they can be used by libraries. First the corresponding descriptive cataloging rules must be finalized. The revised AACR2 Chapter 12, Serials and Integrating Resources, was due to the publisher in February. Then the changes must be implemented by LC and by the utilities. Ideally, LC, OCLC and RLIN will implement them at the same time. Apparently, that may happen sometime next fall, but there is no official announcement yet. I will write more specifically about these two changes in future columns, as the time for their implementation draws near. Even good change comes with a price; something else for us to relearn!

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Coming in the June issue of TSLL ...

The last issue of volume 27 promises to be very informative and interesting. In addition to the regular columns, look for these (fiscal) year-end features:

♦ Survey results from the OBS and TS Vice Chairs

♦ A feature on this year’s winner of the Renee D. Chapman award

♦ An interview with AALL Vice President President-Elect (and TS & OBS member) Carol Avery Nicholson

♦ A year-end editorial wrap up and housecleaning.