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COLLECTION DEVELOPMENT

Judge Analytics: Bloomberg v. Ravel Law

*Adrienne DeWitt
Campbell University*

When Ravel Law burst on the scene, the company publicized it as a legal research platform “created by digital natives for digital natives.” It has an attractive interface complete with the one bar search option, an algorithm that reminds me of Fastcase, and free access to the Harvard Law case law collection. Granted, their use of terms like “Search Visualization” makes me scratch my head, but then, I’m not a digital native.

Beyond Ravel Law’s pretty features and visualization, the platform provides something more than case law and statutes; it also provides access to Judge Analytics. In legal research today, there is great interest in sifting through data in order to determine a probable outcome. Ravel Law’s Judge Analytics jumps on this trend by claiming that Judge Analytics can “uncover patterns, insights, and outliers about how a judge might think, write, or rule.” If true, Ravel Law’s Judge Analytics would appear to raise the bar and set Ravel Law apart from other legal research platforms.

There is a catch. Despite Ravel Law’s free access to case law, its access to Judge Analytics is pay walled. To access Judge Analytics, you need to be either an “Elite” or “Enterprise” member of Ravel Law. Before you pick up the phone, however, keep in mind that Bloomberg Law has now added “Litigation Analytics” to its platform. Found under their “Litigation & Dockets” tab, Litigation Analytics provides access to Company Analytics, Law Firm Analytics, and Judge Analytics.

Using Bloomberg Law’s Judge Analytics is straightforward. Simply click on the Judge tab and enter a federal judge’s name (currently, this only works for federal judges). The information retrieved shows the judge’s court opinions (including the number of times cited), a graph of motion outcomes, appeal outcomes, length of cases by type, and appearances by case type, top firms, and top companies. Best of all, it links directly to the Bloomberg docket.

Just for fun, I went ahead and compared Bloomberg’s Judge Analytics with Ravel Law’s Judge Analytics. I used William Earl Britt of the Eastern District

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Contributing Authors:

Acquisitions:

Luz Verguizas

Classification:

Aaron Kuperman

Collection Development:

Adrienne DeWitt

Description & Entry:

vacant

The Internet:

Wilhelmina Randtke

Library Metrics:

vacant

Management:

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Serial Issues:

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Subject Headings:

Patrick Lavey

TechScans:

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Online Bibliographic Services Special Interest Section

Bridging the Literacy Gap in Legal Education

“The past is not dead. It’s not even past.”—William Faulkner

Johannes Gutenberg has been widely credited with spreading literacy throughout the western world through his mechanical printing invention in the Fall of 1454. Mainz was the seat of a conflict between the Pope in Rome and the local monastery. Rome expected the church in Mainz to use the liturgical text issued by the Pope, but the local monastery had written and was following its own liturgical text. In response to this conflict, Gutenberg invented the printing press. Gutenberg’s first liturgical text printing project did not materialize because the audience using this work could not afford to pay for commercially printed copies. Gutenberg was deeply in debt most of his adult life, but he saw a crisis in the religious community and seized the opportunity to provide a solution to stocking libraries with a good edition of the Bible.

As the legal profession responds to an economic crisis, the focus has shifted from thinking like a lawyer to acting like one. Technical services law librarians are in a unique position to bridge the legal research literacy gap that is occurring as newer members enter the legal profession. As a profession, technical services law librarians have integrated knowledge within an ongoing context, which conveys meaning not understood by nonmembers of the profession. With a view toward equipping those we serve with practice-ready legal research skills, the expertise of technical services law librarians is required to bridge the literacy gap in the legal profession.

No doubt Gutenberg realized an unexpected outcome when he managed failure during his career. Unlike Gutenberg, technical services law librarians have a community of practice to turn to as we problem solve in our respective careers. Looking ahead, I encourage each of you to volunteer in the American Association of Law Libraries (AALL) during the next year. Most importantly, your technical services leaders need to hear from you regarding the challenges you are managing presently. Problem solving together as a profession, technical services librarians will be able to learn and teach each other.

Most importantly, the advances towards a common mission will facilitate the enrichment of our knowledge and effectiveness in the legal profession. With the bar set by Gutenberg, technical services law librarians are responding to a high calling today. In the days ahead, I look forward to hearing your insights on the movement to reform research services provided to our various stakeholders in the legal profession. If your future plans include attending the annual meeting in Austin, I look forward to seeing and talking to you in July.

*Marjorie E. Crawford
Rutgers University*

Technical Services Special Interest Section

Change. Some people thrive on change. Others are incredibly challenged by it while others are able to calmly accept it as a fact of life. Change can be gradual or sudden. I am one of those that would prefer to plan for change, but recent years have shown me that is often not an option. Maybe that is why I ended up as a technical services (TS) librarian—it is a field with a long history of doing things according to the rules, and changing those rules takes time, so it affords me the option to plan.

However, technical services (if that is what your department is still called) is currently in a state of constant flux. Some of us are embracing the changes in our responsibilities, systems, staffing levels, and position titles, while others champion existing structures and practices. There is nothing wrong with either perspective, but everyone can count on the fact that there will be change. My mindset, as a non-traditional TS librarian, is that things will ultimately reach a livable resolution.

The process to get there may be neither comfortable nor fun, but I will learn something about myself in the process of getting to the new normal.

With the idea of change in mind, the Technical Services Special Interest Section (TS-SIS) Executive Board has initiated a review of our standing committees. In 2014, we added a Professional Development Standing Committee—the first change to the standing committee structure in more than 20 years. The structure of the four additional standing committees (Acquisitions, Cataloging & Classification, Serials, and Preservation) has remained static during this same timeframe. These standing committees perform many important tasks; however, the roles of technical services librarians have expanded far beyond their scope. To address this, we have created an ad hoc “Committee on Committees,” graciously chaired by Suzanne Graham, and tasked them with reviewing both the standing committee structure within TS-SIS and the professional roles of its members. Please provide this committee with feedback so they can make recommendations to improve and expand upon the functions of our standing committees.

In addition to the review of committees, we are also tackling the funding of the three TS representatives to the American Library Association (ALA) committees and attempting to re-vamp fundraising for the Marla Schwartz Grant. The Academic Law Libraries Special Interest Section (ALL-SIS), Government Law Libraries Special Interest Section (GLL-SIS), Online Bibliographic Services Special Interest Section (OBS-SIS), Private Law Librarians & Information Professionals Special Interest Section (PLLIP-SIS), and TS-SIS are working together to fund the representatives for the current year, but we still seek a more long-term solution. These financial challenges are going to be a primary focus in the coming months, and I openly seek your feedback or suggestions on how to overcome them.

I would like to close by thanking Eric Parker for his dedication to TS-SIS. He has spent the last four years on the Executive Board, serving as a Member-at-Large prior to being elected Vice Chair. He deserves much of the credit for what TS-SIS is tackling this year, and I hope I am able to follow through with the same dedication. While unpredictable circumstances led to me becoming Chair earlier than anticipated, I am excited to work towards a flexible and sustainable plan for the future of TS-SIS, no matter what changes come our way.

*Lauren Seney
William and Mary*

ACQUISITIONS

Using Excel for Monthly Accounts Reconciliation

*Luz Verguizas
Columbia University*

As most librarians know, the reports generated from an integrated library system (ILS) are only as good as the quality of the system’s records. In acquisitions work, accurate record keeping is crucial in order to maintain a balanced budget; one small error, like choosing the incorrect currency in an order record or inverting an amount on an invoice, can create confusion and frustration. To avoid such problems, periodic reporting and record cleanups are necessary. If you are able to generate expenditure reports from your ILS, the best way to keep tabs on your library’s spending is by doing a monthly reconciliation report. Explained as simply as possible, a reconciliation report compares various sets of data in order to find a match or discrepancy. Or put another way, “reconciliation is the idea that information kept in different areas relates to the same transaction. It is like putting the pieces of Humpty Dumpty back together again to make a complete whole” (Kirk and Getz, 19). Ideally, you would want to compare the information from your ILS to the information from your accounting department, if and when available.

Why is a monthly reconciliation of accounts so important? There are many reasons. First and most importantly, it helps problems or errors bubble up to the surface more quickly, issues which might otherwise linger, or worse, fester. It can also reveal where there may be gaps in your training of acquisition staff and provide teachable moments. Second, reviewing monthly transactions gives you a snapshot of where your library’s materials budget is going, when, and to whom. Third, it gives you a better sense of control. In an era where there is much more granularity in reporting and access to information, it is quite possible that your library or law school administration is reviewing expenditures more closely than before. It is just as important to remain informed of large purchases, increases, or even cancellations as it is to know when there was an overpayment, misdirected/lost payment, or accounting error. It is important to remember that “when a dean looks at a law school budget, the biggest expenditure after faculty salaries is the library,” and many must wonder “what are all those people doing with all that money?” (Fitchett et al., 95). Reviewing your accounts monthly will allow you to better answer

questions from administration and more accurately manage current and future spending, which is necessary because “scrutiny of law library budgets will not go away with improved financial stability” (Fitchett et al., 95).

At our law library, our E-Resources Librarian, Lisa Genoese, and I are two of only a handful of people who have trained for and received access to Columbia University’s financial system, which is a PeopleSoft Financials Enterprise Resource Planning (ERP) system; locally, it is referred to as Accounting & Reporting at Columbia, or ARC. ARC gives the University the ability to manage and track all of its diverse financial activities. One of my favorite features is its reporting capabilities. There are hundreds of canned reports and queries available. That being said, it is possible to create a query using Structured Query Language (SQL), which can be tailored to your department’s specific needs. I discussed our needs with Lisa, and she was able to build a query to match some of the fields from the voucher data we output from our ILS, Innovative Interfaces’ (III) Sierra. Our E-Resources Coordinator, Tom Baker, then created an application that would convert the exported voucher data from Sierra into a text file we could then import into Excel. If your library has access to a) its organization’s ERP or b) monthly financial reports in Excel format, you may be able to more easily reconcile monthly expenditures between your ILS and your organization’s financial system using Excel, and I will explain those steps later.

Our library first processes the invoices it receives into Sierra. Once we post the invoice sessions in Sierra, we then enter the invoices into ARC to create vouchers. Eventually, we issue a payment to the vendor. From July 2016 through December 2016, our library created 2,107 voucher distribution lines in ARC. Reconciling all of this data is not straightforward because there are so many elements to match, and I am only human after all. I am by no means an Excel expert, but I am also not Excel-averse, so I knew there had to be a way for the program to do what I had been painstakingly doing more-or-less manually for some time. What I was trying to do was match the 1) invoice number, 2) account, 3) project, and 4) fund total or distribution line total from my Sierra report to my ARC query report. I scoured the Internet looking for tips and tried many different proposed solutions, but none worked for this particular scenario, until I came across the wonders of an array formula. According to AbleBits.com contributor Svetlana Cheusheva, “an array formula in Excel evaluates all individual values in an array and performs multiple calculations on one or several items according to the conditions expressed in the formula.” After a series of trials and errors, I was able to create an array formula that worked for matching each of the variables, and when it did not match, it would return an “N/A” in a destination cell.

As promised earlier, following are my instructions for reconciling month-end transactions between Sierra and ARC. For my library’s purposes, we can reconcile any items paid via an ARC voucher using the spreadsheet (including our P-Card/Credit Card transactions). The instructions below are specific to our workflow and available reports, but I’m hoping you will be able to adapt these to suit your own needs.

For the Sierra Portion

1. Use Sierra Output Vouchers (not Print Vouchers) to generate a range of vouchers. You will be reconciling transactions for a particular month, so your record number range will be for the voucher records you processed for that particular month. The default is “Override existing file,” and this is the option you want.
2. When you have chosen your range of record numbers, click on Start. The process may take some time, particularly if you are generating all the vouchers. When this process ends, you will see a message in the big text area (“Brief Results”) telling you how many vouchers there are. Click on Save As, and save the file to your own machine.
3. Using the application Tom created, I then upload the file, convert it, save it to my desktop, and open it in Excel.
4. Click “File,” then open and search for the Sierra txt file on your desktop. Click Open, Delimited → Next → Tab → Next → Text (update the first column “Invoice” from “General” to “Text,” otherwise your invoice number formatting will be incorrect) → Finish, then Save as “Sierra v ARC Reconciliation” (in Excel Workbook).
5. Rename the tab “Sierra Data.”
6. Highlight the first row and apply filters.
7. From the ARC account column, filter to show only the accounts you want to reconcile.
8. Create a new tab and name it “Sierra v ARC,” then from the “Sierra Data” tab, copy the following columns to the corresponding columns below:
 - Vendor (paste to column A)
 - Inv. # (paste to column B)
 - ARC acct.(paste to column C)
 - ARC proj. (paste to column D)
 - Fund total (paste to column E)

9. Sort column A, "Vendor," by Alphabetical Order.
10. Name column F "Source," type "SIERRA" in cell F2, then drag down or copy the formula to all cells in that column (this is how you'll remember this is your Sierra source data).
11. Create a new tab/sheet in the workbook and name it "ARC Data."
12. Save.

For the ARC Portion

1. Run the Query Viewer from ARC.
2. Select the Query Name you would like to use.
3. Select "Run to Excel."
4. From Invoice Date (five-year calendar range): 01/01/2014
To Invoice Date: 01/01/2019 (Choose this range of dates in order to capture any old or future-dated invoices; you will narrow down this range later on.)

Format the Reports: ARC Data Matching on Sierra Data

1. Delete row 1 (this just shows the total number of vouchers generated in the report).
2. Copy the entire sheet from the open ARC report you just generated and paste it to the "ARC Data" tab on your open "Sierra v ARC Reconciliation" workbook. The following columns should be relabeled as indicated:
 - Date (in column H) to "Check/ACH Date"
 - Name (in column F) to "Vendor Name"
 - Merchandise Amount (in column J) to "Fund Total"
3. Highlight the first row and apply filters.
4. Highlight the "Vendor Name" column, then sort alphabetically from A to Z.
5. From the "Account" column, filter to show only the account numbers you would like to reconcile.
6. From the "Created" column, select only the Current Fiscal Year and month(s) you are reconciling.
7. Copy the following columns from the ARC Data tab and paste into the "Sierra v ARC" tab in this column order directly to the right of the existing Sierra data:
 - Vendor Name (paste to column H)
 - Invoice (paste to column I)
 - Account (paste to column J)
 - Project (paste to column K)
 - Fund Total (paste to column L)
8. Rename column M, "Match Formula."
9. Rename column N, "Source," enter the word "ARC" in cell N2, and drag down to the end.
10. Rename column P, "Notes" (here is where you will enter any additional information after you have reconciled).
11. Click in cell M2, then click into the formula field at the top and enter the following formula (DO NOT hit enter at the end):

=INDEX(\$E\$2:\$E\$1723,MATCH(I2&J2&K2&L2,\$B\$2:\$B\$1723&\$C\$2:\$C\$1723&\$D\$2:\$D\$1723&\$E\$2:\$E\$1723,0)) Now, without hitting enter, click **CTRL+SHIFT+ENTER** to activate the array formula.
12. From cell M2, drag the formula down the column to the last entry. Items showing as #N/A were not matched, and you should highlight them as possible errors to review further.

Following is a description of each of the terms you just used in the formula above:

| Terms | Definition |
|------------|--|
| =INDEX(| Use the following fields as an index upon which to match |
| \$E\$2: | Sierra Fund Total Column, first entry through |
| \$E\$1723, | Sierra Fund Total Column, last entry, |

| | |
|------------|---|
| MATCH | MATCH on the following fields |
| (I2& | ARC Invoice & |
| J2& | ARC Account & |
| K2& | ARC Project & |
| L2, | ARC Fund Total, |
| \$B\$2: | Sierra Invoice Column, first entry through |
| \$B\$1723& | Sierra Invoice Column, last entry & |
| \$C\$2: | Sierra Account Column, first entry through |
| \$C\$1723& | Sierra Account Column, last entry & |
| \$D\$2: | Sierra Project Column, first entry through |
| \$D\$1723& | Sierra Project Column, last entry & |
| \$E\$2: | Sierra Fund Total Column, first entry through |
| \$E\$1723, | Sierra Fund Total Column, last entry, |
| 0)) | Ensure these are an exact match |

Here is a screen capture of what the final results should look like:

Discrepancies will appear as #N/A in column M. To clearly mark these, I highlight in yellow and bold as shown below:

After you have done this a few times, it gets easier. Keep in mind that the more frequently your unit or department performs its reconciliation, the more likely it will be able to identify issues and resolve them before they become part of a systemic problem. However, if a discrepancy is found, there are a few things to consider:

- Are there any items which have not yet posted in Sierra or ARC (including credit card transactions)?
- Are there any items which still need to be reversed in either system?
- Was there something voided in one system and not the other? Always make sure what's done or not done in one system is done or not done in the other. There should always be a one-to-one match.
- Transposition Error: If you have a difference that cannot be located and it is divisible by "9," then the error may be that you have transposed a number. For example, you may have entered a "10" rather than a "1" (the difference is "9").

If you still cannot locate the discrepancy, walk away and come back later. If you just cannot seem to get the unreconciled difference down to zero, the best thing to do is save your work and resume the reconciliation tomorrow. A fresh eye can do wonders. Or, reconcile more frequently. Consider reconciling accounts weekly or twice a month. Just remember that the more frequently this is done, the less painful it will be each time you do it, and the more educated you will become about your own budget.

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CLASSIFICATION

Classification and Cuttering of Periodicals/Serials

Aaron Kuperman
Library of Congress

While the social sciences have numbers for periodicals, such as HV6000-HV6005 (for general periodicals on criminology) or periodical cutters within tables, e.g., HN101/4 .A1-.A6 (for periodicals on social history, one number countries in a larger table), law catalogers have to cope with significantly more complicated numbers for periodicals and serials, both in the schedules and as part of each of our excessive tables.

Scholarly journals always get special treatment

For starters, we have to distinguish between scholarly journals full of serious articles that can be cited in a brief, term paper, thesis, or journal article, versus other types of periodicals. The rationale for this was that American law schools traditionally wanted to shelve all the law reviews together, arranged alphabetically. Preceding K1, we include the note "periodicals consisting predominantly of legal articles, regardless of subject matter and jurisdiction," as opposed to "periodicals consisting primarily of informative material (newsletters, bulletins, etc.) relating to a particular subject."

We make an exception for "ancient or defunct (historic) legal systems," including Roman and ancient law, ignoring the fact that many journals discussing Roman law also discuss civil or canon law, and most journals specializing in legal history include ancient law as well. While not mentioned in the note preceding K1, there is also an exception for "religious law" (principally Jewish, Islamic, and Canon), which classes in KB7-KB68. In the relatively new KZ section, there is a note saying "legal articles" go to K1-30, although at KZ21, there is a number for "yearbooks," whereas the equivalent number at K64 was bracketed and replaced with an instruction to use K1-30 (also note that KB68 is still used for religious law yearbooks). KZA (law of the sea) and KZD (space law) have their own periodical and yearbook numbers at 1006 and 1021. While we have rules, there appears to be no consistent rule for treating annually published journals consisting of scholarly articles.

K1-30 arranges the journals by the first word, and then sub-arranges by the second letter of the first word of the title. Many law journal titles begin with very common words (such as "Journal" or "University") resulting in absurd cutters; the problem is partially addressed only for Spanish and French (special rules for "revista" and "revue"). There should be a rule to go with the first significant word (non-article/preposition) excluding common words.

Note that the definition of "scholarly law journals" for classification purposes is broader than the definition of "law reviews" in Library of Congress Subject Headings (LCSH) or the Library of Congress Genre-Form Thesaurus (LCGFT), which define a law review as emanating from a law school, whereas K1-30 (and equivalents) include any scholarly journal regardless of source (e.g., emanating from a professional association or even a commercial publisher). If the work consists primarily of scholarly articles (a giveaway is the presence of too many footnotes), it goes in K1-30 or the equivalent. If the journal also includes some statutes and cases, that classification should not change. However, if the work is a mixture of statutes, cases (sometimes called "jurisprudence" in civil law countries), and articles (often called "doctrine"), an "all-in-one" genre

generally not found in the United States, it probably doesn't belong in the K1-30 unless the articles are the largest part. Library of Congress Classification (LCC) should address this genre, as there is no single "good" place to put it, although in practice, people sometimes class these works in K1-30 (the schedule's instructions notwithstanding), sometimes as general works (treatises, for example, which they are not), sometimes as cases, and sometimes as statutes. If the work has a subject focus, it will class with the subject, and the tables for use with specific subjects usually have a periodicals cutter (e.g., .A15 in KF6 and K11), but that does not help if the work covers all aspects of the legal system rather than a definable subject.

Periodicals that are not scholarly journals

While the language varies, what does not go in K1-30 (or equivalents) includes "informative material, e.g. newsletters, bulletins" (the K1-30 standard) and perhaps "gazettes, yearbooks, bulletins, etc." (as in the instructions for the Table K11, .A15 cutter). In theory, these things are not cited in footnotes (although gazettes can be the official source that needs to be cited and many yearbooks are simply scholarly journals published annually). There are periodical numbers of this type for all subjects, and if there is no cutter table, one can still put them in the number by subject (non-K catalogers do that all the time). However, if the periodical is not subject specific (first heading "Law—[country]" or "International law", etc.), it is not clear where it should class. There are no numbers for periodicals that are not "relating to a particular subject" and are also not "legal articles." This "genre" that is not a genre includes legal newspapers, newsletters, and "all-in-one" works that compile statutes, cases, and legal scholarship (similar to the traditional American looseleaf service). A solution to this problem would be to take the currently closed periodical numbers in all the schedules (e.g., KF175, KJV6, KL-KWX6 6) and open them for periodicals that not scholarly enough for K1-30 and also not about a particular subject.

Specific types of periodicals and non-periodical serials

The cutter tables include provisions for serials or periodicals for many types of legal materials, but not all. Thus, while we have separate periodical and monographic cutters for subject-oriented case reports (e.g., KF6 .A519 and .A52), we have a single cutter for digests (.A53). For specific statutes (K11, .A31 date), there are separate serial and monograph cutters for unannotated and official texts, but for annotated editions and commentaries, there is only one number, meaning commentaries will get the same cutter regardless of whether they are monographs or serials. KF6 does it differently in its .A328date cutter, moving the serial editions of unannotated and official editions of specific statutes to the .A29 compilation cutters—which undermines the whole principle of trying to keeps works on a specific statute together.

One should remember that the original KF schedule came out the same time as the first edition of *Anglo-American Cataloging Rules (AACR1)*, meaning that the original structure reflected pre-*AACR1*, which is causing a problem three catalogue codes later. In particular, many works that were perceived as monographs are now serials, and while they are "continuing resources" in that they keep coming out with new editions, they are not "periodicals" (meaning no "periodicity"—editions are published when they feel like it). While this is in theory more efficient (it is less work to check in a new "issue" than to catalog a new edition), it not only messes up the descriptive cataloging (because serial cataloging prefers entry under title even when there is a single author and even though our users normally cite works by the author), and it also raises questions for cutting. If a multi-edition monographic treatise, entered in the general works cutter (e.g., KF6 .A9-.Z8) which is captioned "Treatises. Monographs" and usually cuttered by the name of the author, is recataloged as a serial, should we continue to enter it in the "general works" number cuttered for author, or should we put it in KF6 .A15 under title as if it were a newsletter? Apparently, the idea of a treatise being other than a monograph was not foreseen, based on descriptive cataloging standards 50-plus years ago. It is probably best to keep treatises in the cutter for "Treatises," and perhaps we can arrange them based on the person that most users identify as the creator (perhaps using a workaround similar to the rules allowing annotated statutes to be cuttered by the creator of the annotations, even if the 110 is the jurisdiction, e.g., K11 .A31date .xA6-.xZ8).

Given that we will increasingly be classifying works that exist primarily as electronic resources and have been cataloged under *Resource Description and Access (RDA)*, we probably need to make some serious adjustments to how we treat serials and periodicals, as mid-20th century rules simply will not work with 21st century legal publishing.

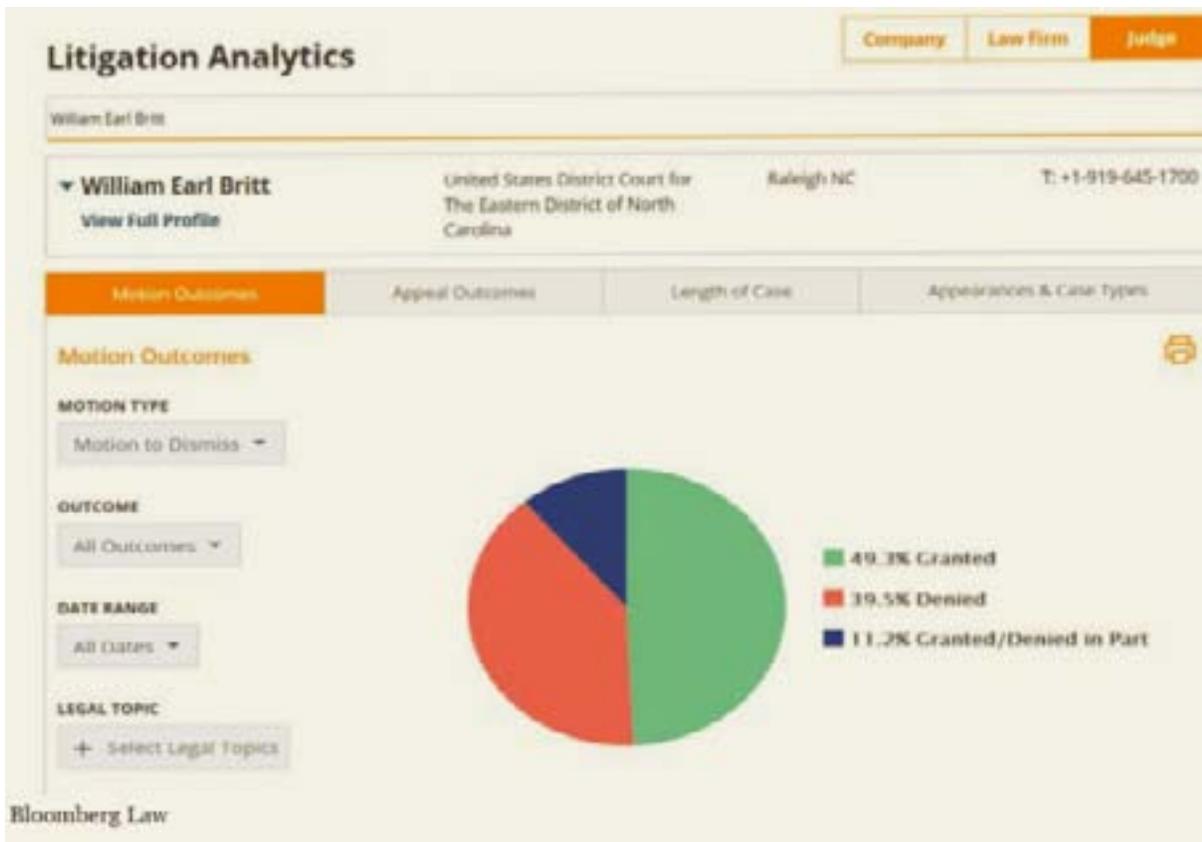
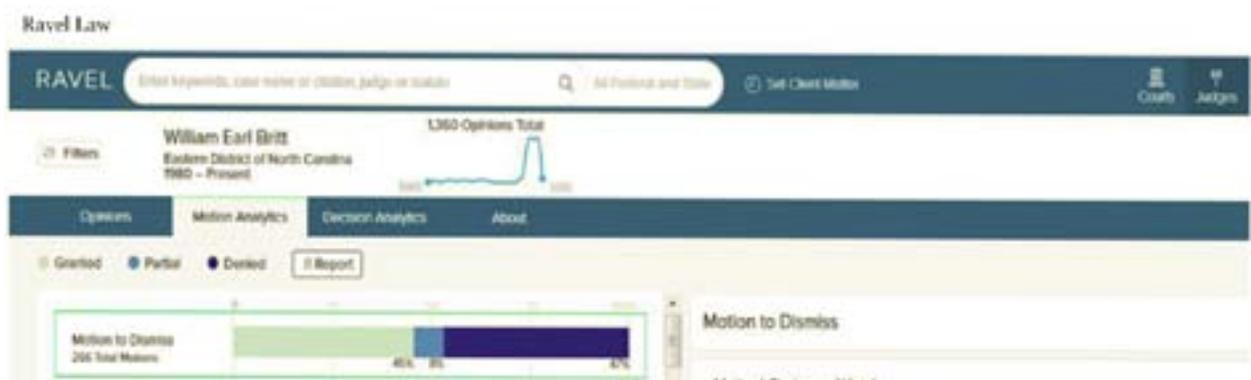
This is not an official policy statement from LC.

Continued from page 1

of North Carolina as the judge and discovered that, according to Bloomberg Law, he granted 49% of motions to dismiss, denied 39%, and granted in part 11%. Conversely, Ravel Law found Judge Britt denied 47% of motions to dismiss, granted 45%, and granted in part 8%.

This is not a huge discrepancy, but Ravel Law appeared to emphasize Judge Britt's denials of motions to dismiss more so than Bloomberg Law. This could be because of the color-coding or perhaps because Ravel Law uses a bar graph and not a pie chart. If I were considering filing a motion to dismiss, and I only saw Ravel Law's analytics, I might be persuaded against filing, even though the analytics reveal Judge Britt to be fairly even handed in deciding these motions.

Bloomberg Law is an expensive platform, and not all libraries may have access to it. Ravel Law may be a good addition for those libraries looking for a more reasonably priced analytics resource. You can contact Ravel Law at <http://info.ravellaw.com/contact-us-form>.



Are You Cataloging?

Melody Lembke
University of California, Irvine

Are you cataloging? Are you cataloging along with multiple other tasks? Then you could see your name here on this column. Do you have to be an expert? No. I think the only characteristic you need is to be curious.

It is definitely déjà vu for me to be a guest contributor to this column. I started the column in 1979 when I was also editor of *Technical Services Law Librarian (TSLL)* (please don't tell me that was before you were born!). *TSLL* had other columns, but nothing on description and headings. I would throw bibliographic record printouts (or Library of Congress (LC) card proof slips!) into a file if they caused me to ask, "Now why did whoever cataloged this title, do X?" Then I would write something three times a year (because usually the American Association of Law Libraries (AALL) conference issue was too full to need another column). I asked other people questions if I could not figure out why the choices were made that were reflected in the record. If you volunteer to write this column, I am sure other Cataloging and Classification Committee members would be happy to read your column before the issue went to press in case you had any doubts about what you were writing. I co-wrote with other column authors as well—ask a friend to work with you.

If you write for *TSLL*, what does it get you? Maybe you need a professional activity for your next review? My biggest motivation was always that I was learning, and I could share that information with other law catalogers. I worked for years for an institution that could not have cared less if you were contributing to the profession. AALL efforts had to be totally your decision because you wanted to do it. Does that sound like your firm?

For me, writing for *TSLL* was a stepping stone. In a volunteer organization like AALL, if you are dependable, you usually are asked to do other stuff. Did I start writing and editing with the goal of being on the AALL Executive Board? No. I just kept doing what I liked doing, usually saying yes when asked. Michael Maben and I are asking you now to volunteer; please write something about description or access points that you noticed that might be of interest to others. *Resource Description and Access (RDA)* is still evolving and confusing. Help us all out.

For instance, my latest example of new work versus expression argument is an American Bar Association (ABA) book:

- 130 0 American Bar Association's legal guide to video game development
- 245 10 Legal guide to video game development /|cedited by Ross Dannenberg
- 250 Second edition
- 264 1 Chicago, Illinois :|bABA, Section of Intellectual Property Law,|c[2016]
- 300 xviii, 295 pages :|billustrations ;|c26 cm
- 336 text|btxt|2rdacontent
- 337 unmediated|bn|2rdamedia
- 338 volume|bnc|2rdacarrier
- 504 Includes bibliographical references and index
- 505 0 Copyrights and immediate protection for your ideas -- Trademarks : choosing your brand -- Protecting ideas : patents, trade secrets, and contracts -- Business and finance issues -- Business risk and insurance -- Intellectual property agreements -- Content-related issues -- Taking virtual candy from an actual baby : virtual goods, microtransactions, and user-generated content -- License agreements, privacy policies, and other legal considerations -- Social media considerations -- Advertising and promoting your game -- Publishing and development agreements -- Legal disputes
- 650 0 Copyright|xComputer programs|zUnited States
- 650 0 Video games|xLaw and legislation|zUnited States
- 650 0 License agreements|zUnited States
- 700 1 Dannenberg, Ross A.,|eeditor
- 710 2 American Bar Association.|bSection of Intellectual Property Law,|esponsoring body

This was cataloged as an expression of the original edition published in 2011, which led to the inclusion of the preferred title of the first edition as seen in the 130. There is no other helpful information for your patrons or reference staff as to its relationship other than that 130. This is a law book, not *Hamlet*. A quick review of the table of contents shows you the contents have changed. The law about this topic is evolving. Several OCLC libraries have agreed that this second edition is a new work and deleted the 130, adding a 775 identifying this as a revision of the work. Others added a note plus a 730 (as 775 not indexed in local system); either would be more helpful to the user than that 130 preferred title.

775 08 |i Revision of: |t American Bar Association's legal guide to video game development. |b 1st ed. |d Chicago, Ill. : American Bar Association [Forum on the Entertainment & Sports Industries], ©2011

Just an example to make you think. I am sure you could come up with stuff like this every quarter. Give it a shot.

THE INTERNET

Open Researcher and Contributor ID (ORCID) in the United States

*Wilhelmina Randtke
Florida Virtual Campus*

What is ORCID?

Open Researcher and Contributor ID (ORCID) is a system for scholars to register for a unique identifier and fill out a profile with information about scholarly activities. The ORCID registration system stores information about the scholar, publications, and scholarly activities. The information ORCID stores goes beyond publications and includes information about grants, service as a reviewer on journals, and a wide variety of information that goes beyond a citation list. Users can mark each scholarly activity in ORCID as private or public, so it is possible to keep a complete curriculum vitae behind the scenes in ORCID while only displaying a polished concise profile to the world. At its core, ORCID allows name disambiguation on publications, grants, and scholarly activities.

ORCID also includes a web application program interface (API), which allows different applications, websites, institutional repositories, and other systems to read records from ORCID, update ORCID, or write new records to ORCID. An application run by anyone, anywhere in the world can use the ORCID identifier to disambiguate scholars with similar names. The application can then interact with the information about that person's scholarly activities.

Right now, there is buzz about ORCID. Some big projects in Europe, like Joint Information Systems Committee (JISC), have gone to a process of pushing records to ORCID as materials are added to a repository or research system. Funder mandates across Europe now require grant recipients to keep records in ORCID about grant-funded research, including: in Portugal, projects funded by the Fundação para a Ciência e a Tecnologia (FCT); in Austria, projects funded by the Fonds zur Förderung der wissenschaftlichen Forschung (FWF); in the United Kingdom, projects funded by the National Institute for Health Research (NIHR) or by Wellcome; in Ireland, projects funded by Science Foundation Ireland (SFI); and in Sweden, projects funded by the Swedish Research Council (SRC). Grants through all those institutions require recipients to record grant-funded activity in ORCID, so grant recipients have recently had to address ORCID.

Another reason for the recent buzz about ORCID is that some scholarly journals have begun requiring authors submitting papers to include an ORCID along with contact information as part of the submission process. If you see a published paper where all authors have an ORCID listed along with institutional affiliation, that's a sign that the journal is requiring authors to provide an ORCID. The purposes of that are so someone indexing the paper can disambiguate authors and someone wanting to contact an author who has changed jobs can check the ORCID profile for current contact information of someone with a common name. Some grant applications in the United States also will request the ORCID identifier, although to my knowledge, none are yet requiring recipients to post information to ORCID.

The Dynamics of Implementing ORCID.

There are two APIs for ORCID. One, which is free-of-charge and open to everyone, allows your application to read public ORCID information. The other is a paid API, which allows your application to read public and private ORCID information and to write new records or update existing records. Fee structures for the paid API are simple. There is a flat rate fee of \$5,000 to use the ORCID API with a single application, and there is a fee of either \$10,000 or \$25,000 (based on organization's budget size) to use the ORCID API with an unlimited number of applications. There is a 20% discount for non-profits.

In order to implement the free-of charge API, you need to know whether your faculty have registered for ORCID and what their ORCID identifiers are. This is something the library can potentially find out by searching <https://ORCID.org/>.

For applications using the paid API, the scholar who “owns” the ORCID must first log in to your application, then you must have the technology to pass them through from your application to ORCID, where they grant permissions to your application regarding how it can interact with ORCID. This means faculty have to log in to two things, and they have to do it themselves. The library does not have their ORCID passwords and cannot grant access on their behalf, so, probably, the majority of faculty will have to create an ORCID profile as part of this process. Presentations about JISC institutions implementing ORCID over the past two years indicate that just over 10% of faculty have previously registered an ORCID. Most faculty create the ORCID as part of the roll out. Part of the roll out process will be introducing faculty to ORCID—perhaps a first introduction.

Because of funder mandates in Europe, the technology to “talk” to ORCID is now more likely to be built into publication platforms you are already using. If your applications are not yet on ORCID and you want to implement ORCID, it is best to express interest to the open source community or vendor and say you are interested in the ORCID API. Technology issues you have to handle in your own institution go back to authentication issues. Your application needs to know which faculty member has logged into it before passing that person on to ORCID. Faculty information needs to be in your application. Before you can connect a profile to ORCID, the profile must first exist. If campus has let you plug into a central login system and pull information from it, that is helpful. For example, if faculty can use their Blackboard login to log in to the repository and that faculty Blackboard information has prepopulated profiles in your repository, then you are good to go for this leg of implementation. From campus to campus, IT security practices vary. If you are in a position where you have to require faculty to sit down and create an account in your application, then create an account in ORCID, the dynamics of how much time you are asking for are different. The two technology issues you have to address are: one, make sure the software you are using can already interact with the ORCID API so you do not have to code anything or invent workflows from scratch, and two, know well ahead of time how you will populate your application/repository with faculty information.

One technology issue that will go great in your institution is any security review for faculty logging into your application, then you passing them through to ORCID, then them logging into ORCID and granting access to your application. Your application never sees their ORCID password. For the long term, your application stores an access token which lets it go back to ORCID again and again for years, but that token is specific to your application and not a huge liability. If there is any type of security review about what your application is storing in order to connect to ORCID, you should be able to provide a link to the technical information on ORCID’s website, and the security review should go through fine with no issues.

After roll out, something to consider on an ongoing basis is what information your application will push to ORCID. When your application adds a record to ORCID, if that record is public, it will show up on the scholar’s public profile. Same thing if your application updates a record—that update goes live on the scholar’s public profile, and any applications anywhere in the world also using ORCID could read that information and update profiles on other websites across the web. You want to ensure faculty know this, and you should be aware of the possibility of pushing out wrong information to the world or of presenting a minor publication along a significant one.

Trying ORCID for Yourself.

Something I hinted at in the previous section is a possibility of “garbage in, garbage out,” if an application is writing to ORCID without someone periodically reviewing the citations and records.

To see this in action in ORCID, you can connect an application to ORCID.

One quick way to connect an application to ORCID is to register for Impact Story. Impact Story is an altmetrics program which collects citations, Twitter shares, and all kinds of information. It has a “big tent” for what it collects. Impact Story lets individuals register, and it also sells departmental and institutional dashboards. It also works with the ORCID API. What is important for looking at ORCID is that you can register an ORCID, register an Impact Story account, and push your Impact Story information to ORCID. To do this: (1) go to <http://orcid.org/> and register, if you have not already. You can fill out your profile with publications; (2) go to <https://impactstory.org> and register, if you have not already. Impact Story will prepopulate from some different sources; (3) on your Impact Story profile, click on the “Publications” tab then on “Add Publications.”

The first time you do this, Impact Story has you log into ORCID to grant access, then you can click through a process of adding your publication information from Impact Story to ORCID. The ORCID login is a one-time process, and if you go back tomorrow and “Add Publications” again, you will go directly to the process of choosing what to write to ORCID.

After the initial grant of permission, Impact Story could update automatically without your input, but instead, it is set up to have you use a process where you decide which publications to add.

Here are some oddities I encountered. For me, when Impact Story collected my information, I had the same publication appear twice, because it was online in a couple of different places, and some things like that. Therefore, I needed to do a little manual cleanup when I first registered and it harvested my material. In addition, when I pushed records from Impact Story to ORCID, it listed Uniform Resource Locators (URLs) from the Scopus record (an Elsevier-owned product) for the publication. For a *Law Library Journal* article, this means the application added a link to Scopus Preview, where you get an abstract and no download (not even for a fee), rather than a link to the PDF which is available free-of-charge on the American Association of Law Libraries' (AALL) site.

I'm not trying to knock Impact Story. It works as an example because it is easy to register for and uses the ORCID API to write records. It did a good job of listing my publications for me to clean up, and when it writes to ORCID, it has me use the process so I can control the update and review what information it is sending. (This moderated step-through is not the norm for institutional repositories. The norm is automated or support-staff-moderated updates.) It will not send "garbage out" unless I tell it to, so I can choose to send just the records I like. The interface in Impact Story makes me keep things clean regarding the ORCID updates.

Once you have ORCID set up at your institution and you are pushing information, you should periodically do a manual review. One great thing about the ORCID public profiles on orcid.org is that for each publication, it lists the source of the metadata. Under the citation or record, there is a source note, and it is easy to skim and clean up your application's updates. You can work through your faculty and look at records coming from your system to see how you could improve those records.

What ORCID Means for Law Libraries.

Because of the funder mandates in Europe, which were implemented in 2014 to 2016, there is a chance that federal grants in the United States might include a requirement to update ORCID with information about grant activities. Grants are huge for some departments on campus but may not be so significant for law. If you are academic, then your first work with ORCID will likely be part of a roll out of ORCID on your main campus. The two entities on campuses most likely to be involved in ORCID are the institutional repository, usually operated through the library, and the research information management system (RIM) (something like VIVO or Symplectic Elements), most likely operated through the grants office. Because software for RIMs is generally much pricier than software for institutional repositories, many campuses do not have a RIM, and to my knowledge, no law schools have a RIM run entirely within the law school. The most likely way ORCID will impact law schools is if a funder mandate forces main campus to implement ORCID and for main campus to require all faculty, including law faculty, to register. If that happens, it will be similar to law school activities in the area of an institutional repository and would likely fall to the library to understand and address.

If you are in a governmental law library, any funder mandate may impact your organization. Depending on how your agency/court is structured, the law library might or might not be involved.

If you are in a law firm library, the most likely way you would come into contact with ORCID is through publishing. If lawyers in your firm publish regularly, eventually one will come across a publication requiring ORCID. Overall, however, ORCID is not likely to affect you in the near future, as you may have guessed from the use of "faculty" throughout this article.

MANAGEMENT

Off My Rocker

Beth Farrell
Cleveland-Marshall College of Law Library

"Do not confuse motion with progress. A rocking horse keeps moving but does not make any progress" – Alfred A. Montapert.

I recently sat stewing in my office, struggling to compose meaningful goals for my direct reports' annual evaluations. As National Public Radio (NPR) played in the background, I agonized about these goals—in between co-workers coming into my office to ask questions (or just to chat) as well as checks of my text alerts and Outlook email pings—and felt more overwhelmed by the minute. Looking over my desk strewn with documents from an ongoing digitization project and books I was using to research early American case law for a faculty member, I decided my brain was simply too addled for this bureaucratic creative writing project. The problem is, of course, that this despised "bureaucratic creative writing project"

is actually an essential part of my job that should be at the top of my to-do list, not an afterthought to fit in when I feel like it. Obviously, I needed take Montapert's advice and get off my rocking horse!

In *Wired to Create*, Scott Barry Kaufman and Carolyn Gregoire describe my addled state of mind as “being stuck in the shallow water on the surface of the mind.”¹ Interruptions from well-meaning co-workers, my messy desk covered with half-finished projects, and especially my grazing on texts, emails, and news, compromise my ability to focus and solve problems requiring creative thought.² In *Too Fast to Think*, Chris Lewis says our quiet thinking space cannot compete with the noise from demanding electronic communications, and our ceaseless negative feelings of being overwhelmed have implications for creative thought—new ideas cannot arise under “relentless cynicism about the future.”³

So, where should an overwhelmed librarian find space to think? Lewis asked hundreds of people—where do you get your best ideas? The answers included: waking/about to fall asleep; in the bath/shower; running/walking; driving/commuting on a train/bus/plane.⁴ What do these answers have in common? None of them are “sitting at my desk at work.” In the excellent Netflix Original Documentary Series, *Abstract: The Art of Design*, graphic designer Paula Scher says she just cannot sit down at her desk and think creatively. She sits down at her desk to read email, sort through junk mail, make a little order on her desk, and then says, “Oh my God, how am I going to solve this problem? I walk up the stairs, go into the ladies room, put on lipstick, and figure it out.”⁵

When I next attempt to work on the dreaded goals, I have decided I will sneak into an empty conference room and sit in complete silence at a nice big clean table, away from my cluttered desk with its reminders of other work. In college, besides the quiet library, I also very often studied in the cafeteria—the activity and conversations all around me became a companionable white noise, which must have entertained some part of my brain while also allowing me to concentrate. The university cafeteria (or a nearby coffee shop) might be another excellent spot for a creative problem-solving session.

Once I have the appropriate space and quiet/white noise, how can I quiet my mind and mentally hide from my other responsibilities? Kaufman and Gregoire point out how rarely we take the time to mull over an idea or problem like Sherlock Holmes, who would sit silently in his leather chair, eyes closed in utter concentration, until he had achieved some insight to a problem.⁶ In *Mastermind: How to Think Like Sherlock Holmes*, Maria Konnikova says that sitting quietly in creative thought can be unsettling. Not only do we dislike the uncertainty which is an inherent part of generating new ideas, but our new ideas, once presented, could be criticized, so we also fear being embarrassed.⁷ Working creatively often requires a leap of faith, says illustrator Christoph Niemann, who reports that he has found no perfect formula for creating art: “It’s a little bit of a painful realization . . . it really is, to a very large degree, staring at paper. And I have to trust for kind of crazy moments to happen.”⁸ In describing his work for a cover of *The New Yorker*—his 22nd *New Yorker* cover—Niemann says he starts with a thousand different thoughts and then throws them out, one by one, until he has those essential to the question: “I couldn’t just have one idea that just solves the entire thing. I had to start somewhere and say ‘Okay, is this strong enough or flexible enough to just get to the next step?’”⁹

If Einstein can characterize creativity as “the residue of time wasted,”¹⁰ we surely can give ourselves permission to “waste time” and just sit and ponder our problems, overcoming our discomfort with stillness and fear of failure. The good news is the more we practice, the easier it will be to think creatively. That is because “being mindful alters the very structure and function of the brain, supporting executive functions like attention and self-regulation, both of which are valuable assets to creativity.”¹¹ And, because the opposite is also true—constantly giving in to the siren songs of our devices and social media can “contribute to a stressful lifestyle, to operating in crisis management mode, and to a compromised ability to reflect, to make decisions and to think creatively”¹²—I intend to keep reminding myself that not only must I get off the rocking horse in my office to creatively solve work problems, I must to do it for my health!

Endnotes

- 1 Scott Barry Kaufman and Carolyn Gregoire, *Wired to Create: Unraveling the Mysteries of the Creative Mind* (New York: Perigee, 2015), 109.
- 2 Ibid, 108.
- 3 Chris Lewis, *Too Fast to Think: How to Reclaim Your Creativity in a Hyper-Connected Work Culture* (New York: Kogan Page, 2016), 25.
- 4 Ibid, 128.
- 5 *Abstract: The Art of Design, Paula Scher: Graphic Design* (Los Gatos, California: Netflix, 2017).
- 6 Kaufman and Gregoire, 105.
- 7 Maria Konnikova, *Mastermind: How to Think Like Sherlock Holmes* (New York, Viking, 2013), 118.
- 8 *Abstract: The Art of Design, Christoph Niemann: Illustration* (Los Gatos, California: Netflix, 2017).
- 9 Ibid.
- 10 Lewis, 2.
- 11 Kaufman and Gregoire, 110.
- 12 Ibid, 109.

The MARC Advisory Committee (MAC) convened two meetings at the ALA Midwinter Meeting in Atlanta. MAC took action on five discussion papers and seven proposals during the meetings. The complete texts of all proposals and discussion papers considered at the 2017 ALA midwinter meetings of the MARC Advisory Committee are available at https://www.loc.gov/marc/mac/mw2017_age.html.

MAC discussed and approved the following proposals:

Proposal No. 2017-01

Redefining Subfield \$4 to Encompass Uniform Resource Identifiers (URIs) for Relationships in the MARC 21 Authority and Bibliographic Formats

<https://www.loc.gov/marc/mac/2017/2017-01.html>

Source: British Library in consultation with the Program for Cooperative Cataloging (PCC) Task Group on URIs in MARC

This proposal recommends the redefinition of subfield \$4 (labeled as either “Relator code” or “Relationship code”) in a wide range of fields in both the Bibliographic and Authority formats, to allow the recording of URIs for relationships. Currently, we can only use subfield \$0 (labeled as “Authority Record Control Number or Standard Number,” “Authority Record Control Number,” or “Record Control Number”) to record URIs for relationships, creating ambiguity in cases where it is possible to record URIs for both relationships and the entities associated with those relationships in the same subfield string. The proposed redefinition of subfield \$4 would allow catalogers to record relationship URIs in a separate subfield that distinguishes them from URIs for entities. The paper also recommends that, “where \$4 is currently labelled ‘Relator code,’ it would be appropriate for this to be made less prescriptive by relabeling it ‘Relationship code.’ Likewise, the accompanying definition should be changed, replacing the term ‘MARC code’ with a phrase which references the broader concept of designations in coded form.” MAC approved this proposal, with two committee members abstaining.

Proposal No. 2017-02

Defining New Subfields \$i, \$3, and \$4 in Field 370 of the MARC 21 Bibliographic and Authority Formats

<https://www.loc.gov/marc/mac/2017/2017-02.html>

Source: Association for Library Collections & Technical Services (ALCTS) Subject Analysis Committee (SAC) Subcommittee on Genre/Form Implementation

Proposal No. 2017-02 proposes the addition of several new subfields to field 370 (Associated Place) in the Bibliographic and Authority formats. Catalogers would use subfields \$i (Relationship information) and \$4 (currently Relationship code) to clarify the relationship of the associated place recorded in the field to the resource being described. Catalogers would use subfield \$3 (Materials specified) to indicate that an associated place applies to only a part or portion of the resource, such as when the parts of a collaborative work are created in different places. During the discussion of this proposal, it was suggested that new indicators, designating “work,” “expression,” and “no information,” be defined for field 370 as well, but this would have to be brought forward separately from the proposal under consideration. MAC approved the proposal, with two abstentions.

Proposal No. 2017-03

Defining New Subfields \$i and \$4 in Field 386 of the MARC 21 Bibliographic and Authority Formats

<https://www.loc.gov/marc/mac/2017/2017-03.html>

Source: ALCTS Subject Analysis Committee Subcommittee on Genre/Form Implementation

Defining subfields \$i (Relationship information) and \$4 (currently Relationship code) in field 386 (Creator/Contributor Characteristics) would provide the ability to “clarify the relationship of the creator/contributor terms recorded in the field to the resource being described.” This is expected to be particularly useful in situations where there are multiple creators and/or contributors, with differing demographic characteristics, associated with a resource. MAC approved the proposal contingent upon some refinement of the wording. Two committee members abstained from voting.

Proposal No. 2017-04**Using a Classification Record Control Number as a Link in the MARC 21 Bibliographic and Authority Formats**

<https://www.loc.gov/marc/mac/2017/2017-04.html>

Source: German National Library

This proposal, put forward by the German National Library, recommends the scope of subfield \$0 (Authority Record Control Number or Standard Number) in the Bibliographic and Authority formats be broadened to allow it to provide a link between fields containing classification numbers and MARC classification record control numbers. MAC approved the proposal unanimously.

Proposal No. 2017-05**Defining a New Subfield in Field 340 to Record Color Content in the MARC 21 Bibliographic Format**

<https://www.loc.gov/marc/mac/2017/2017-05.html>

Source: The Cataloging Advisory Committee (CAC) of The Art Libraries Society of North America (ARLIS/NA)

MAC unanimously approved this proposal to define a new repeatable subfield \$g in field 340 (Physical Medium) in order to record the color content of a resource with a slight rewording of the definition of the new subfield.

Proposal No. 2017-06**Adding Subfields \$b, \$2, and \$0 to Field 567 in the MARC 21 Bibliographic Format**

<https://www.loc.gov/marc/mac/2017/2017-06.html>

Source: National Library of Finland

Field 567 (Methodology Note) is defined in the MARC 21 Bibliographic Format as “[i]nformation concerning significant methodological characteristics of the material, such as the algorithm, universe description, sampling procedures, classification, or validation characteristics.” The National Library of Finland proposes the addition of subfield \$b (Controlled Term), subfield \$2 (Source of Term), and subfield \$0 (Authority Record Control Number or Standard Number) to field 567 in the MARC 21 Bibliographic Format, in order to introduce a level of standardization to the use of the field. MAC approved this proposal with one abstention.

Proposal No. 2017-07**Adding Value “No information provided” to the First Indicator of Field 070 in the MARC 21 Bibliographic Format**

<https://www.loc.gov/marc/mac/2017/2017-07.html>

Source: National Library of Finland

Catalogers use the first indicator value in Field 070 (National Agricultural Library Call Number) to designate whether the resource they are cataloging is in the U.S. National Agricultural Library’s collection or not. While Finnish agricultural libraries use NAL classification, the existence of a given resource in the NAL collection is irrelevant to them. The National Library of Finland proposes that a third value (blank) meaning “No information provided” be defined for indicator 1. The British Library expressed resistance to this proposal because of their belief that the 070 field refers only to classification numbers actually assigned by NAL. MAC eventually approved the proposal with two abstentions and at least one vote opposed.

MAC considered the following discussion papers:

Discussion Paper No. 2017-DP01**Use of Subfields \$0 and \$1 to Capture Uniform Resource Identifiers (URIs) in the MARC 21 Formats**

<https://www.loc.gov/marc/mac/2017/2017-dp01.html>

Source: PCC Task Group on URIs in MARC

As more libraries experiment with Linked Data, it is becoming clear that MARC data cannot be transformed into Linked Data without some refinement of existing MARC structures and the implementation of new fields and subfields. A key area in which Linked Data require more semantic precision than is specified in MARC is the distinction that must be made between “Real World Objects,” or “RWOs,” and records (like authority records, which are also RWOs) that describe other RWOs. This distinction is explained in the discussion paper as follows:

“RDF [i.e., *Resource Description Framework*] statements about a living person may include lifespan dates or a home address, which would be accessible from a URI [*Uniform Resource Identifier*] that functions somewhat like a Social Security number. But an authority record is fundamentally different because it is an information object that may contain a description of a person, as well as a revision history and other facts about the record itself. Although this difference may seem pedantic, it is important for making precise statements about library resources. When we state in a machine-understandable form that ‘William Shakespeare is the author of Hamlet,’

we want to ensure that the reference is to the person who lived from 1564 to 1616, and not to an authority record or similar document. In short, a person can be an author, but a record cannot.”

The paper proposes restricting the use of subfield \$0 (Authority Record Control Number or Standard Number) to URIs that refer to *records* describing RWOs and defining subfield \$1 to contain URIs that refer directly to the *RWO itself*. Subfield \$1 is currently undefined in MARC 21 and is therefore available for this purpose throughout the MARC formats, wherever RWO URIs are needed.

There was general agreement among the committee members that it is necessary to make a distinction between RWOs and authority records in MARC. The paper may return to the committee as a second discussion paper or as a proposal.

Discussion Paper No. 2017-DP02

Defining Field 758 (Related Work Identifier) in the MARC 21 Authority and Bibliographic Formats

<https://www.loc.gov/marc/mac/2017/2017-dp02.html>

Source: PCC Task Group on URIs in MARC, Program for Cooperative Cataloging (PCC)

This paper recommends the definition of a new field 758 (Related Work Identifier) in the Authority and Bibliographic formats. The intent is for catalogers to use this in cases where “a work identifier (or URI) is available, but is not explicitly associated with an authorized access point or other title construction. Examples include a URI for an algorithmically generated entity such as an OCLC work, or a URI pointing to an external non-library source such as a Wikidata entry. For the Bibliographic format, this proposal addresses the use case where the work referenced by an identifier of this kind stands in a primary relationship with the entity described by the bibliographic record.” The paper also recommends using subfield \$4 to specify relationships in authority records, as in this example, indicating a “sameAs” relationship:

758 ## \$4 <http://www.w3.org/2002/07/owl#sameAs> \$0 <http://viaf.org/viaf/179062815>

According to the paper, the ability to specify relationships in this way would facilitate the transformation of MARC data into Linked Data. The discussion paper may return as a proposal.

Discussion Paper No. 2017-DP03

Defining New Fields to Record Accessibility Content in the MARC 21 Bibliographic Format

<https://www.loc.gov/marc/mac/2017/2017-dp03.html>

Source: Canadian Committee on Metadata Exchange (CCM)

This paper posits that “[a]s assistive technologies have evolved, providing alternative access to content in a variety of formats, the ability to accommodate accessibility metadata in MARC 21 has not kept pace.” The paper recommends the definition of two new fields in the Bibliographic Format: field 341 (Accessibility Content) and field 532 (Accessibility Note). A redefinition of Field 007 (Physical Description Fixed Field) position 2 (Accessibility) was included in the paper, but withdrawn after the committee’s discussion. The consensus of the committee was the paper needs further development, possibly including the creation of a list of terminology to be used in the proposed field 341.

Discussion Paper No. 2017-DP04

Defining Subfields \$u, \$r and \$z in Field 777 of the MARC 21 Bibliographic Format

<https://www.loc.gov/marc/mac/2017/2017-dp04.html>

Source: Canadian Committee on Metadata Exchange (CCM)

The Canadian Committee on Metadata Exchange proposes defining subfields \$r (Report number), \$u (Standard Technical Report Number) and \$z (ISBN) for use in Field 777 (Issued With Entry) of the MARC 21 Bibliographic Format. The three subfields in question are associated with monographs, while the 777 field was originally created to express a serial-to-serial relationship. Even though format integration eliminated most format-based restrictions on the use of MARC data elements in describing various types of materials, the subfields associated with field 777 were never updated and still do not include the three monograph-related subfields in question. This paper may return as a proposal.

Discussion Paper No. 2017-DP05

Providing Institution Level Information by Defining Subfield \$5 in the 6XX Fields of the MARC 21 Bibliographic Format

<https://www.loc.gov/marc/mac/2017/2017-dp05.html>

Source: German National Library

Subfield \$5 is used in certain fields of the MARC 21 Bibliographic Format to indicate the “MARC code of the institution or organization that holds the copy to which the data in the field applies. Data in the field may not apply to the universal description of the item or may apply universally to the item but be of interest only to the location cited.”

In this paper, the German National Library proposes extending the definition of subfield \$5 to the 6XX range (i.e., subject access) of fields in the Bibliographic Format, in order to express the idea that a particular subject heading or term has been used in accordance with the policy of a specific organization. The paper generated a relatively long discussion wherein committee members expressed reluctance to conflate the kinds of information expressed in a subfield that has historically contained item-level information with work-level information associated with subject headings. Use of a different subfield, such as subfield \$8, was suggested for the German National Library’s proposed purpose. This paper may return to the committee as a proposal.

OCLC

Announcements from OCLC

*Jason LeMay
Emory University*

Connexion Client Users Must Upgrade Before March 1, 2017

As was mentioned last summer, OCLC discontinued Connexion client versions 2.40, 2.50, and 2.51 on March 1, 2017. Anyone currently using these older versions of Connexion will receive a warning when they start the client. Prior to March 1, users should visit the Software Downloads page at Product Services Web to download Connexion client version 2.63. Product Services Web is located at <http://psw.oclc.org/>.

Jisc and OCLC Collaboration on National Bibliographic Knowledgebase for UK

Jisc and OCLC are collaborating to deliver a new service that will “aggregate academic bibliographic data at scale” to create a new National Bibliographic Knowledgebase (NBK) in the United Kingdom. While the primary audience of this new service will be the UK, the NBK will “connect to WorldCat to share metadata with the global library network.” The full news release is available at <http://www.oclc.org/en/news/releases/2017/201702sheffield.html>.

PRESERVATION

The New Archivist’s Initial Checklist—Part 2: Straight Out of the Gate

*Matthew Jenks
University of New Hampshire*

In Part 1 of this two-part column, we created a list of the very first tasks an archivist should accomplish when launching a new archival venture. If you have completed this list, you have disinfected your archival space and secured as much of your collection as possible (even if only temporarily) in storage bins and archival grade containers, protecting your oldest and most vulnerable items first. You have determined your inventory needs and ordered additional supplies accordingly. Finally, you have created your master record groups and subgroups and developed your classification system to reflect both the structure of these groupings and the structure of the institution the archives serves. At the end of this, you have arrived at the beginning; your archives is ready to launch.

Part 2 is a follow-up checklist I developed through talks with experienced archivists, reading various handbooks on archiving, and my own trial and error. It is at best my own list and may not work for everybody. Other archives and other archivists may have different priorities, depending on their own special needs. What I can say is that at least a few of the tasks will overlap with your own, and I believe just creating a list like this is what is most important.

So, what is the most important task on this list? What is the one piece everyone should include and everyone should make a priority? That’s easy:

1. With acknowledgements to Maxine Wright, create a Collection Care Prioritization Plan (CCPP)! This, to me, is mandatory. It has been invaluable to me as I have moved forward with our fledgling archives. The CCPP is all about focusing

on initiatives within the archives—preserving what is most valuable or vulnerable as a priority and then moving on to other important tasks on the list. It means to be your own road map, tailored to your specific archive’s needs. The main difference between it and a full preservation plan is financial. Whereas a full plan is comprehensive and charts the overall path of an archival collection (with the requisite budget), a CCPP is needs-based and targets what is most important and urgent to protect now. In other words, for those archivists feeling the “financial pinch,” a CCPP is the way to go. It has been a perfect fit for our smaller collection and budget.

2. In concert with your Collection Care Prioritization Plan (CCPP), create accession records, classify, and label the items or groups of items in your collection as you store and preserve them. This is in contrast to the temporary storage you initiated from the list in Part 1. This is the true, long-term preservation and the meat-and-potatoes of your archives and its mission. You are engaging in the heart of your calling, however tedious it can be sometimes. Classification is done according to the system you already created in Part 1. Accession records are created as a record of your item or items, and they are your first crack at describing your archival holdings. You will want to be as comprehensive as possible here because these records will be the springboard later on for any digitization you might do. In essence, what you put into your accession records is the descriptive metadata for the items in your collection. What tags you use will vary from institution to institution, but, at a minimum, you will want to include metadata such as date received, title, source, physical description, classification number, location, scope, content, and archivist, understanding that different terms can be used for each of these labels. It is not necessary to map these names to specific metadata languages like Dublin Core or content standards like Describing Archives: A Content Standard (DACS) or Encoded Archival Description (EAD), as long as the terms are clear (though you can if you prefer). The main goals are: the terms and overall description fit with the mission of your archives, they are as complete as possible for your institution’s needs, and they are consistent. Lastly, put clear and accurate labels on your containers and sub-containers (photo envelopes, folders, etc.) as you store, showing the range of items covered in your container(s). Not every archive does this, but it works well for us.
3. Create your Mission Statement: There are entire books written on this subject, and I will not pretend to be an expert at it. However, there are a few key things that must be included in any solid mission statement: stakeholders, purpose, and philosophy. In the case of an archive, philosophy means: What do we collect and why? Our mission statement has not had final approval, but I think it serves its purpose:

“The genesis of establishing an institutional and historical archives at UNH Law began by considering the needs of its numerous stakeholders, both past and present. UNH Law (formerly known as Franklin Pierce Law Center) is a law school and an institution rich in many things—Education, Knowledge, Scholarship, Tradition, Continuity, Diversity—but it is also a place and community which is the sum total of all the experiences, interactions and relationships of its Partners and Stakeholders—the Students, the Faculty, Staff, and Alumni of what is now the University of New Hampshire School of Law. That is what forms the basis for the formation of an institutional archives; to create a record and repository of the school’s history, culture, and identity, and all that they entail: Traditions, Experiences, Life Passages (graduation etc.), and Stories (those tales, hopefully true, that combine to form the mythos and character of the law school). In this way the Archives becomes both a place for relevant stakeholders to connect and reconnect with an important place and time in their lives, AND it becomes a new and powerful marketing tool for publicizing the law school and all that it has to offer to a wider world. In essence, the UNH Law Archives is the written and recorded identity of the law school, and a tool for communicating that identity to the outside world.”

There is nothing wrong with adding a little passion to your mission statement, but try to keep the language precise and the message clear.

4. Spread the Good Word: This is an organic process (which I am in the middle of), but, in essence, it involves forming and establishing ongoing relationships and contacts with people throughout your institution who will be important in the life and function of the archive. This involves understanding reporting relationships, informal relationships, school networks, and those sorts of contacts who may not be “on the books” as it were, but who are nevertheless crucial contacts when trying to “grease the wheels” and get things done. Set up a meeting with your director or school librarian. Have a conversation with the dean. Get to know his administrative assistant as well. Speak with faculty, staff, and alumni. Learn who pulls strings, who is the history buff, who has connections to other school collections. Obviously, this aspect of being an archivist is the trickiest to navigate, and there are no set standards other than being open and friendly. But it can also be the most rewarding, and you can make some new friends in the process.

A note here: we also have an occasional blog on which we post interesting finds from our archive collections. This helps publicize the archives while being a great marketing tool for our school as well.

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5. Come up with a Strategic Plan: Much broader than the CCPP, it will enable you to define the big-picture plan for the archives, and it will help you stay on course. This is the archive's statement about where it wants to go in the future, with some broad ideas about how to get there. Here you can present a more reflective, aesthetic view of the overall archival collections. Think of it as the grand plan.

I would add a note here that, along with the CCPP, Ms. Maxine Wright provides some very concise, simple, and helpful ways of separating and delineating priorities when you are working on any plan. She calls them the 3 Ps:

Policies: the overall intentions and directions of the library—the “why” and the “what.” They set out the principles and rules for guiding decisions and achieving desired results (aimed at delivering the mission and strategic aims of the library).

Plans: used to set out specific objectives and how they will be achieved. They direct work, allocate resources, outline timeframes, and allow for monitoring progress. They are the “when,” “who,” and “where” involved in meeting the library's statement of purpose. They may have a lifespan of one year or more, with frequent updates as actions are completed.

Procedures: the hands-on activities involved in looking after and managing a collection. They are the record of the regular processes used. Having them written down gives staff confidence, increases consistency, and enables monitoring against an agreed standard. They are “how” to meet the library's statement of purpose. Procedures are developed as working documents at an operational level. They should be available to anyone involved in the activities they describe. They can be annotated, expanded, and amended as practice develops (Wright, p. 18).

By breaking down any plan, from strategic to Collection Care Prioritization, into the 3 Ps, you will be much better equipped to sort out and prioritize what to accomplish and how to do it. To me, it is a great way of organizing your plan.

These five steps in Part 2 comprise my own personal list, but they are only a beginning. In future columns, I will try my best at tackling arrangement and digitization. Happy Preservation, Custodians of History!

References

Wright, Maxine. *Preservation Column – Technical Services Law Librarian (AALL)*, v. 39, no. 4, 2014.



PRIVATE LAW LIBRARIES

*Amber Hawkins
Little Mendelson, P.C.*

Back in June 2015, our library team was replaced as our firm moved from one location to a new one halfway across the country. I was hired as one of the replacements and inherited a system that was unlike any I had ever seen. I come from a public library background, so the world of private law libraries was new and foreign to me. Fortunately for me, the change meant that there was opportunity for innovation and an opening to rebuild from the ground up. I took on the challenge with considerable excitement, as technical services is where my expertise lies.

One of the main goals since I started was to reduce the firm's dependency on print and make a solid push towards digital resources. This is not to say that we have thrown out all the paper in the library and purchased online subscriptions—that is not realistic. In order to do this, we needed to take a close look at what we had, what we were getting, and whether or not we needed duplicates. More often than not, the answer has been a resounding no.

To start this endeavor, we made it a goal in 2016 to replace our dinosaur of an integrated library system (ILS) with something newer and catalog the firm's collection from scratch. It has been a daunting task. There was no easy way to import the old records into the new system. Even if there had been, I did not think it was a wise idea as I was not sure if some of our offices still had titles the system said it did. As part of this process, we began with taking an inventory of our main library collection and searching our various online subscriptions and the Internet to see if the titles were available in digital form. We have slowly expanded this process to other offices with quite a bit of success.

Along with this inventory is the task of cataloging the items we are going to keep. Our previous call numbers were not quite Library of Congress, so I have been updating as we go. This is also allowing us the opportunity to train additional members of the team on how to check the old system, compare it against the new one, and correct changes.

With 2017, we are making a pointed effort to complete weeding our collection and gather inventories of the collections in the other offices so our catalog is an accurate representation of what we have. I would like to think that 2017 will see our library finding the right balance between print and digital.

RESEARCH & PUBLICATIONS

Peer-Reviewed Journals for Technical Services Librarians

Hollie White
Duke University

As law librarians, we have access to publications like the *Technical Services Law Librarian*, *Law Library Journal*, and *AALL Spectrum*. While these are all great publications, there is a dearth within law of potential peer-reviewed publications and research journals for those of us specializing in the areas of traditional and evolving technical services (TS). Research-minded technical services librarians should turn to journals outside law library publications to stay current on the latest practices, research, and theories in our area. Below is a list of journals to consider when looking at potential research articles or publication venues. While there is no “one size fits all” solution and this list is in no way comprehensive, these titles are options beyond the law library for future research and publication projects.

TS Foundations

| | | |
|---|---|---|
| Cataloging & Classification Quarterly | http://catalogingandclassificationquarterly.com/ | Focus on bibliographic organization. |
| Serials Librarian | http://www.tandfonline.com/loi/wser20 | Covering all aspects and formats of serials. |
| Journal of Library Metadata | http://www.tandfonline.com/loi/wjlm20 | Marking the importance of metadata from cataloging to online. |
| Library Collections, Acquisitions, and Technical Services | http://www.tandfonline.com/loi/ulca | Brings together publications on library management and technical services for different types of libraries. |
| Serials Review | http://www.tandfonline.com/loi/usrv20 | International serials community focused with emphasis on interviews, conference reports, and book reviews. |
| Technical Services Quarterly | http://www.tandfonline.com/toc/wtsq20/current | Focusing on the practice and theory of all aspects of technical services work. |
| Collection Management | http://www.tandfonline.com/toc/wcol20/current | Practical, research-based articles on collection care, preservation, organization, and assessment. |
| Journal of Access Services | http://www.tandfonline.com/toc/wjas20/current | Focusing on delivery of service and access to traditional and electronic resources. |
| Journal of Electronic Resources Librarianship | http://www.tandfonline.com/toc/wzze20/current | Current research on electronic resource management (ERM) and acquisitions that crosses over from technical services to public services. |

Theory/Research Focused

| | | |
|------------------------|---|---|
| Knowledge Organization | http://www.isko.org/ko.html | Addresses concepts, theory, classification, indexing, and knowledge representation. |
|------------------------|---|---|

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|-------------------------------------|---|---|
| Journal of Documentation | http://www.emeraldinsight.com/journal/jd | Focuses on theories, concepts, models, frameworks, and philosophies in information organization. |
| Electronic Library | http://www.emeraldinsight.com/loi/el | Digital information research in information organization and knowledge creation. |
| Other | | |
| Journal of Digital Media Management | https://www.henrystewartpublications.com/jdmm | Asset Management beyond traditional library settings. Articles are frequently written by industry managers. |
| Library and Archival Security | http://www.tandfonline.com/toc/wlas20/current | Security in libraries and archives including disaster preparedness and data. |
| Journal of Web Librarianship | http://www.tandfonline.com/toc/wjw120/current | All aspects of “web librarianship” including web services and systems librarianship. |

Perpetual Access

SERIALS ISSUES

*Angela Hackstadt
University of Arkansas*

Librarians at the University of Memphis explain how they used fixed- and variable-length fields in Innovative Interfaces’ Sierra Integrated Library System (ILS) to track information regarding perpetual access to electronic resources.¹

The University of Memphis team developed a system using a combination of fixed- and variable-length fields in their holdings records. They were able to settle on a metadata schema after evaluating licensing agreements for commonly recurring information. They used fixed-length fields to note information about coverage, location, and cost; they used variable-length fields to create supplemental internal notes as needed.

The team identified challenges and limitations to using Sierra ILS for tracing perpetual access information. For instance, the team identified order records as the optimum place for locating that information. However, all of the fixed-length fields in the order record were already in use, so they chose to use the holdings records instead. In addition, vendors do not always include detailed information about perpetual access in their licensing agreements. The team analyzed perpetual access information from in-hand licensing agreements to develop the metadata schema, and they then contacted vendors to complete the recordkeeping for the rest of their electronic resources. In addition, they had to enter fixed-length codes manually.

Using the available features of your ILS can be a convenient way to store and track perpetual access information for electronic resources. The team was able to leverage Sierra’s “Create Lists” function to identify electronic resources with perpetual access for review when the University of Memphis canceled a large number of journals. The effort and staff hours put into developing the initial schema and workflows for maintenance saved the library staff time when they had to locate canceled journals in the system.

¹ Andrew R. Grissom, Steven A. Knowlton, Rachel Elizabeth Scott, *Notes on Operations: Perpetual Access Information in Serials Holdings Records*, 61 *Library Resources & Technical Services* 57 (2017).



SERIALS TITLES

Crystal Alberthal
University of Washington

The serials staff of the University of Washington School of Law, Gallagher Law Library, recently identified the following serial title changes:

Lesbian/Gay Law Notes

December 1986-December 2015
(OCoLC 10938096)

Changed to:

LGBT Law Notes

January 2016-
(OCoLC 935720365)

The serials staff of the University of Washington School of Law, Gallagher Law Library, recently identified the following serial cessations:

Defense Counsel Journal

Ceased in print with: v.83 no.4 (October 2016)
(OCoLC 15181996)

Continued online: <http://defensecounseljournal.org/?code=iadc-site>

Also available on HeinOnline
(OCoLC 66412751)

DePaul Business and Commercial Law Journal

Ceased in print with: v.14 no.2 (Winter 2015)
(OCoLC 50872999)

Continued online: <http://via.library.depaul.edu/bclj/>

Also available on HeinOnline

(OCoLC 54882930)

DePaul Journal for Social Justice

Ceased in print with: v.8 no.2 (Spring 2015)
(OCoLC 176915232)

Continued online: <http://via.library.depaul.edu/jsj/>

Also available on HeinOnline

(OCoLC 218174494)

DePaul Journal of Sports Law and Contemporary Problems

Ceased in print with: v.11 no.1 (Spring 2015)
(OCoLC 81015630)

Continued online: <http://via.library.depaul.edu/jslcp/vol11/iss1/>

(OCoLC 51610556)

Hastings Communications and Entertainment Law Journal
(Comm/Ent)

Ceased in print with: v.38 no.2 (Spring 2016)
(OCoLC 23676569)

Continued online: <http://journals.uchastings.edu/journals/websites/communications-entertainment/index.php>

Also available on HeinOnline

(OCoLC 53322547)

Index to Foreign Legal Periodicals

Ceased in print with: 2016

(OCoLC 01752740)

Continued online: Available on HeinOnline

(OCoLC 61311266)

The Journal of College and University Law

Ceased in print with: v.42 no.3 (2016)

(OCoLC 01792838)

Continued online: <http://jcul.law.rutgers.edu/>

Also available on HeinOnline

Natural Resources Journal

Ceased in print with: v.56 no.2 (Summer 2016)

(OCoLC 01759480)

Continued online: <http://lawschool.unm.edu/NRJ/volumes/index.php>

Also available on HeinOnline

(OCoLC 52637785)

New Mexico Law Review

Ceased in print with: v.46 no.2 (Summer 2016)

(OCoLC 01759914)

Continued online: <http://lawschool.unm.edu/nmlr/volumes/index.php>

Also available on HeinOnline

(OCoLC 61312684)

Nexus

Ceased with: v.21 (spring 2016)

(OCoLC 34621378)

Perspectives: Newsletter About Women Lawyers

Ceased in print with: v.24 no.4 (Summer 2016)

(OCoLC 24677168)

Continued online: <http://www.americanbar.org/publications/perspectives/2016/summer.html>

Also available on HeinOnline

Temple Political & Civil Rights Law Review

Ceased in print with: v. 25 no.1 (Spring 2016)

(OCoLC 25677715)

Available on HeinOnline

**Subject Analysis Committee (SAC)
Association for Library Collections & Technical Services (ALCTS)
Cataloging and Metadata Management Section (CaMMS)
American Library Association (ALA) Midwinter Meeting
Atlanta, GA, January 2017**

*Lia Contursi
Columbia University*

Program presentation: Music & Law Genre/Form: Implementation, Practice, and Experience (Lia Contursi, Columbia Law School and Casey Mullin, Western Washington University)

Policy and Standards Division (PSD)

The Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PS) were updated four times in 2016 with a total of 43 changed or deleted instructions. Summaries of updates are posted on the Library of Congress Acquisitions and Bibliographic Access (ABA) website in a more timely fashion than in the *Resource Description and Access (RDA)* Toolkit. A history of all changes, both older and more recent, is available at http://www.loc.gov/aba/rda/lcps_access.html.

[The August 2016 release, LC-PCC PS 9.16.1.3 (Recording Professions or Occupations), contained one notable change. Prior to the August release of the *RDA* Toolkit, all the examples functioning as guidelines for addition of professional terms to an access point showed only terms drawn from a controlled vocabulary, typically from Library of Congress Subject Headings (LCSH). Those MARC examples seemed to imply that while a term from a controlled vocabulary was only “preferred,” the use of a non-controlled term was definitely discouraged. However, they added a new example:

100 1# \$a Thompson, Simon \$c (Professor)
374 ## \$a College teachers \$2 lcsh
374 ## \$a University and college faculty members \$2 lcdgt

Note that “Professors” is a variant entry of LCSH *College teachers*. This means that law catalogers can now feel free to use “Law professor” and not “Law teacher,” if they need to disambiguate a personal name access point with a professional term. Law professors is a variant of LCSH Law teachers.]

ClassWeb and Cataloger’s Desktop

The Library of Congress is developing a new design for ClassWeb and Cataloger’s Desktop. LC will harmonize the two services to facilitate searches. Libraries that subscribe to both services will have a “one-stop searching box” that will allow a simultaneous retrieval of relevant content from both tools. No more details were offered, but the newly harmonized searches are expected sometime this year.

ALA Romanization

The Library of Congress staff supports the continuing research on the improvement of a Japanese ALA-LC Romanization Table. The Table is posted on the Library of Congress Acquisitions and Bibliographic Access (ABA) website, but it can also be accessed directly from Cataloger’s Desktop.

Illegal aliens

The LCSH *Illegal aliens* has been discussed extensively at the Library of Congress, and research has been done on alternative headings that are based on feedback received last year from the wide survey launched by LC. An announcement on the final solution is expected very soon. As of February 8, 2017, no announcement had been made.

LCSH Online Training

The work on online training of LCSH continues. This is a large project developed by PSD and Simmons College. While the training is being developed for new personnel of the Library of Congress, it is also being made available for the larger library community. The modules available so far are:

Unit 1. Foundations; Unit 2. Structure; Unit 3. Subject Headings Manual; Unit 4. Main headings: the details. The instructors are Janis L. Young, a senior cataloging policy specialist in the Policy and Standards Division of the Library of Congress, and Daniel N. Joudrey, an associate professor at the School of Library and Information Science at Simmons College in Boston. Modules 1-4 are available at the following address: <http://www.loc.gov/catworkshop/lcsh/>.

Class KIA-KIX

Subclass KIL for the Law of Indigenous People of Mexico is now formally approved and can be implemented. Proposals for additions or changes can be made through the regular system in ClassWeb.

Art Genre/Form Terms (GFT)

PSD is completing the review and approval of the Art GFT compiled by the Art Libraries Society of North America. The corpus of the vocabulary includes approximately 100 terms. It is expected to be officially approved at ALA Annual Meeting this year.

Demographic Group Terms (DGT)

PSD has extended the period of Phase 3, which consists of submitting proposals for new LCDGT terms, those exclusively for new cataloging needs and not for retrospective application. Guidelines to make proposals are incorporated in the *Demographic Group Terms Manual*. In particular, document L435 gives general instructions on how to prepare a proposal for demographic terms. The LCDGT Manual is available at <http://www.loc.gov/aba/publications/FreeLCDGT/freelcdgt.html>. The vocabulary of LCDGT will be incorporated into Cataloger's Desktop (CD) in the near future, but as of February 8, 2017, it has not yet been incorporated. However, LCDGT is already integrated in ClassWeb.

Music Library Association (MLA)

An MLA Working Group on retrospective application is testing the use of a program developed by Gary Strawn of Northwestern University. The program is able to derive LC Medium of Performance Terms from the music/genre/form/medium headings traditionally placed in the 650 field. The group is also working on a similar program to derive non-medium facets from LC subject headings, including demographic group categories as well as chronological and geographical facets.

International Federation of Library Associations and Institutions (IFLA)

At the 2016 IFLA Annual Conference held in Columbus, OH, the Classification and Indexing Section announced the approval of a proposal for a name change. The section is now called Subject Analysis and Access Section (SA&A). Jointly with the Cataloguing Section, SA&A is participating in a new working group that is preparing revisions of both the *Guidelines for authority records and references*, published in 2001, and the *Guidelines for subject authority and reference entries*, published in 1993. The SA&A has two other working groups: Subject Access in the New Environment, chaired by Maja Zumer, and the Genre/Form Working Group, chaired by George Prager and Ricardo Santos. The group is also a joint group of SA&A and the Cataloguing Sections. It is developing a survey on the implementation of genre/form terms that it will distribute among national libraries.

The next IFLA Annual Conference will be in Wroclaw, Poland, from August 19-25, 2017. The call for papers is posted at <http://2017.ifla.org/programme/calls-for-papers>. Please note the session sponsored by the Law Libraries Section and the Subject Analysis and Access Section at <http://2017.ifla.org/cfp-calls/law-libraries-section-joint-with-subject-analysis-and-access-sections>. SA&A will also jointly sponsor a program with the Bibliography Section entitled "Challenging society and naming identity: Subject access and bibliography in a multicultural world" (<http://2017.ifla.org/cfp-calls/bibliography-joint-with-subject-analysis-and-access>).

SAC Subcommittee on Genre/Form Implementation (GFIS)

Since the annual conference in June 2016, the SAC Subcommittee on Genre/Form Implementation submitted two proposals to the MARC Advisory Committee (MAC) and started two new projects:

MARC *Proposal no. 2017-02* recommends adding \$i, \$4 and \$3 to the MARC field 370 (Associated place) in bibliographic as well as in authority MARC records. The purpose of this proposal is to relate more accurately the connection between a geographic place and the resource described in the MARC record. The proposal was discussed at the ALA Midwinter Meeting of MAC and was endorsed for consideration and final approval by the MARC Steering Group, with the provision of some clarifying rephrasing.

MARC *Proposal no. 2017-03* recommends adding \$i and \$4 to the MARC field 386 (Creator/Contributor Characteristics) in bibliographic as well as in authority MARC records. The purpose of this proposal is to fully describe the relationship between the creator or contributor attributes and the resource being described in the MARC record. This proposal was also discussed at the Midwinter Meeting of MAC and was endorsed for consideration and final approval by the MARC Steering Group, with the provision of some clarifying rephrasing.

After ALA Annual 2016, Rosemary Groenwald submitted a proposal to PSD recommending incorporating a thesaurus of video games genre/form terms into the corpus of LCGFT. The SAC Subcommittee then asked Rosemary to be Chair of the Video Games GFT Working Group (Video Games WK). Composed of eight members, the Video Games WK spent the past three months working intensely on a list of terms, using authoritative web sites on video games sources. The group then selected a final list of 150 terms.

Before ALA Midwinter 2017, the Video Games Chair received news from PSD that they have approved incorporation of Video Games GFT into the larger LCGFT vocabulary, with the caveat that this project may take a long time before its official

start. Meanwhile, the Online Audiovisual Catalogers group (OLAC) has expressed interest in sponsoring the publication of a Video Games GFT thesaurus. The SAC Subcommittee Video Games WK must now make a choice, although the preference is to incorporate the terms in the LCGFT vocabulary. While pondering the two options, the Video Games WK will work on the development of authority records for all 150 terms selected for the final list.

At ALA Annual 2016, the SAC Subcommittee asked Casey Mullin to chair a working group on full implementation of the Library of Congress Faceted Vocabularies. During the fall, Casey formed a Working Group on Full Implementation (WGFI) with six members and wrote a charge for the group, outlining the development of the project.

The WGFI produced a comprehensive white paper entitled “A Brave New (Faceted) World: Towards Full Implementation of Library of Congress Faceted Vocabularies.” This essay introduces the history and the purpose of the newest vocabularies: LCGFT, LCDGT, and LC Medium of Performance Terms (LCMPT). It identifies all issues related to the hindrances to full implementation of all three faceted vocabularies, and it advocates for the indispensable development of a training plan. Furthermore, the essay identifies possible solutions for a full-scale application of all these new faceted vocabularies. The white paper addresses the Library of Congress and the Program of Cooperative Cataloging, as well as OCLC and vendors of integrated library systems. It is now in draft version and was submitted to SAC with the purpose of seeking initial feedback. SAC members offered valuable comments at the SAC Meeting held in Atlanta on January 22. The white paper will now be discussed within SAC GFIS for further analysis and adjustments. It will then be sent to external consultants before the group works on the final version, which will be re-submitted to SAC for approval.



SUBJECT HEADINGS

Patrick Lavey
UCLA

The “Illegal aliens” suspense is killing me. With the Republican victory in the November election, conservatives control Congress and the White House, and the Supreme Court will almost certainly have a conservative majority soon. Per congress.gov, Congress has taken no further action on the “Stopping Partisan Policy at the Library of Congress Act,” introduced in March of last year. This may soon change. In related news, President Trump plans to either deport millions of undocumented immigrants (his statements to the American people) or moderate this subject (his recent statements to the Mexican government). We may be stuck with the subject heading “Illegal aliens” indefinitely, despite the pledges of those who vow to “resist.”

Speaking of resistance, two interesting subject headings have been added to the Library of Congress Subject Headings (LCSH), “Culture jamming” and “Shopdropping.” They are of interest to law catalogers because practitioners of these forms of protest and resistance might easily end up in both civil and criminal court. Law catalogers should print out and read both of these new subject headings, as they have extensive “Source data found” notes and no “Public general” notes. “Culture jamming” is “the act of reorganizing media, via acts like billboard or a magazine advertisement alteration, in a way that gives new meaning to the images, a meaning that carries a political message or social commentary.” “Shopdropping,” a related term, “describes the act of sneaking specifically marked items into a shop and placing them on display. This technique can be used for public art, to promote political views or advertise your services.” It is sometimes known as “reverse shoplifting” and dates to 1989 and the Barbie Liberation Organization (**don’t** ask me). Advocates of these practices may cite free speech concerns in their defense; courts of law can be expected to take a dim view of these forms of protest.

Other interesting new or revised subject headings include “Charlie Hebdo Attack, Paris, France, 2015, in art,” “Drone aircraft—Law and legislation,” “Radicalization,” “Drug accessibility—Law and legislation,” and “Tribal government—Law and legislation.” “Right to good administration” is new and is related to both “Administrative law” and “Human rights.” The heading “United States—Constitution—Emoluments clause” has been in the news the past few weeks. Other new subjects include “Equality in mass media,” “Free rider problem (Economics),” “Racially mixed people—Race identity” and “Museums and sexual minorities.” “Legal technical assistance” is worth looking at, as it is used in several related senses. Again, printing the heading out and reading it in its entirety is worthwhile.

LC modified the scope note for heading “Television and politics,” revised “Terrorist organizations,” and added “Priority of coverage (Insurance law).” We may now use “Energy industry executives” and “Muslim soldiers,” as well as “Criminal law in literature” and “African Americans—Relations with Muslims.”



Contributing authors: Jackie Magagnosc, Emily Dust Nimsakont, Lauren Seney

Acquisitions

From Users to Developers: NCSU's Involvement with an Open Source ERM

A recent article in Code4Lib Journal describes the experience of library staff members at North Carolina State University (NCSU) when adopting and making enhancements to an open source electronic resource management (ERM) tool. According to the article's abstract:

“CORAL, an open source electronic resource management tool, has been adopted by libraries around the world. The community manages the software development contributed to the open source codebase by independent organizations. NCSU Libraries' Acquisition & Discovery Department started using CORAL to manage monograph orders at the end of 2013. Since then, they have completed a series of developments to enhance CORAL functions for workflow management, streamlining the complex electronic resource acquisition process. This paper presents NCSU's adoption and development of CORAL. It explains what prompted the development, shares the experience, from identifying internal resources to outsourcing development work, and identifies challenges and opportunities of the current mechanism of CORAL development.”

The author of the article concludes that CORAL is a strong open source software product, and it seems like NCSU had a positive experience working with it.

Song, Xiaoyan. Code4Lib Journal, Issue 34, October 2016, <http://journal.code4lib.org/articles/11954>.

Information technology

Review of the Recommended Formats Statement

The Library of Congress (LC) has initiated its annual review of the Recommended Formats Statement (<https://www.loc.gov/preservation/resources/rfs/>) and is again calling for feedback. The Statement was initially written in 2014, and after several years of updates, the process will now take on a more focused approach.

Concerns about file formats have dominated the conversation in the past, so there is a specific request for the review of metadata, including the potential incorporation of the work of Federal Agencies Digital Guidelines Initiative (FADGI) (<http://www.digitizationguidelines.gov/>) and the Library of Congress' archiving of podcasts. An additional focus this year is to review the coverage of websites, as this was the first year for inclusion, and Software and Electronic Gaming and Learning. If you have feedback on any of these topics, or a different aspect of the Statement, please send your comments to the appropriate party (<https://www.loc.gov/preservation/resources/rfs/contacts.html>) by March 31 as revisions will begin in April.

Library Technology Launchpad Basics and Resources Series

In 2016, the Library Technology Launchpad blog started a Basics and Resources Series (<http://libtechlaunchpad.com/basics-and-resources-series/>). Each entry provides a definition, summary of the topic, “the basics,” and lists of resources to learn more. In 2016, the series covered:

- Altmetrics
- Application Programming Interface (API)
- Bibliographic Framework (BIBFRAME)
- Linked Data

This series is a great resource for anyone who needs to get up to speed in one of the areas covered. The areas I am familiar with seemed thoroughly covered.

Library Technology Launchpad (“Technology for every librarian”) is edited by James Day, Electronic Services Librarian at Embry-Riddle Aeronautic University. The mission of the blog is to:

Cover technology relevant to librarians and libraries. Covered topics will include:

- Links to library technology news
- eBook purchasing and subscription trends
- Mobile library websites and eReader apps
- Online information resources
- Social media and libraries
- Library user experience (UX)
- Cloud computing for libraries
- Institutional repositories and scholarly communication
- Research data management
- Search engine tips and tricks
- Useful general technology information

Their pages include guides to library technology acronyms, open access journals for librarians, and social media resources for librarians. Library Technology Launchpad seems like an excellent resource for those of us trying to keep up with technology trends in libraries.

Preservation

Ensuring a Future for the Digital Scholarly Record

Recent decades have brought significant changes to the way we store scholarly research. The printed end-product is no longer guaranteed, nor is it necessarily what the researcher is looking for. Many law journals are following the trend in academia and moving to a predominantly, or solely, digital format. With this transition comes a change in thinking as to the best way to manage the archives of these journals and ensure that there is a scholarly record for the future. The Keepers Registry (<https://thekeepers.org/>) at the University of Edinburgh “acts as a global monitor on the archiving arrangements for electronic journals.” The registry strives to identify and work with archiving agencies who have taken on the stewardship of the electronic journals and serials—the aptly-named “Keepers”— and create a network to preserve them for the future.

The Keepers Registry works with the understanding that no single institution can do this on their own and stresses the importance of a collaborative effort. The group meets to address the growing concerns of its members and to help shape the vision for preserving and ensuring perpetual access to this digital content. This past summer, after a meeting of Keeper institutions, a plan was developed to tackle this international challenge: Ensuring the Future of the Digital Scholarly Record (<http://thekeepers.blogs.edina.ac.uk/keepers-extra/ensuringthefuture/>).

To read further commentary on The Keepers Registry, see Mike Ashenfelder’s article in *The Signal* (<http://blogs.loc.gov/thesignal/2017/01/the-keepers-registry-ensuring-the-future-of-the-digital-scholarly-record/?loclr=eadpb>).

***TSLL* EDITORIAL POLICY**

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