

## AutoIt for Technical Services Workflow

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Miami University Libraries

Innovation



Our Library

### TABLE OF CONTENTS

AUTOIT FOR TECHNICAL SERVICES WORKFLOW	1
COORDINATOR'S CORNER	6
BOOK REVIEW: INTRODUCING RDA	7
BARTENDER SOFTWARE ALLOWS DAYTON METRO TO ELIMINATE STICKERS, STREAMLINE WORKFLOW	8
US RDA TESTING PERIOD	10
BOOK REVIEW: ACQUISITIONS IN THE NEW INFORMATION UNIVERSE	12
LCSH HEADINGS FOR COOKING AND COOKBOOKS HAVE BEEN CHANGED	13

"504 \_ \_ Includes bibliographic references and index." How many times have we found ourselves typing the above line in the past few days, weeks or months? How many times have we typed out that same line in a year? The 504 field entry is only one example of how repetitive several tasks and workflows are in technical services. This repetition ranges from the simple and obvious (like the 504 entry) to the complex and hidden. We run lists, updates, reports, create and edit records, input local codes—and these tasks are only a fraction of the repetitive actions that we do manually each day.

Automation software, such as Keyboard Express (<http://www.keyboardexpress.com/>) and built-in macro functions for specific software, such as OCLC Macro Language (OML) (<http://www.oclc.org/support/documentation/connexion/client/basics/macros/>), have helped automate these repetitive tasks. With a push of a couple keys, we can insert local codes, bring up new record templates, and even insert the 504 field note. Most macro programs handle simple tasks very nicely.

CONTINUED on page 2

*TechKNOW* Archive is now on OLC Website  
<http://www.olc.org/TechnicalServices.asp>

Access to the entire run of *TechKNOW* is now available from the TS Division page at the OLC website. Only a partial run has been available until now on the OLC site. Older issues were scanned last year and brought online at the *TechKNOW* mirror site at <http://www.library.kent.edu/techknow>. Now OLC members can access the current issue of *TechKNOW* by clicking on the link at the top of the Division Web page, and the rest of the run via the archive link at the bottom. How nice to have all of our Division materials in the same place. The entire run is also being indexed to improve access.

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Nonetheless, what happens when we want to automate tasks beyond a 504 entry? Is it possible to automate entire workflows that involve multiple programs? Can a macro be taught to think and decide the next action it should take based on the data presented on the screen?

AutoIt (<http://www.autoitscript.com/autoit3/index.shtml>) is one automation program that can handle doing the above actions and more. This article will explore the features of AutoIt, how the Technical Services Department of the Miami University Libraries has used AutoIt, and the benefits and challenges of using AutoIt for workflow automation in technical services.

## AutoIt Basics

AutoIt is a freeware automation scripting language used exclusively in the Microsoft Windows graphical environment. The script editor itself is a text editor, combined with an extensive help file with example scripts for almost every function (see Figure 1).

AutoIt's language follows high level programming logic, and it is simple to learn the language basics. Knowing the OCLC Macro Language (OML) will make it easier to learn AutoIt since OML, like AutoIt, is based off BASIC. Even without programming experience, the AutoIt's tutorials

and the help file will guide the novice through their first "Hello World!" script and beyond.

Like Keyboard or Macro Express, and unlike program specific macro tools such as OML in Connexion, AutoIt can automate tasks that use multiple programs. AutoIt allows users to create their own graphical user interfaces (GUIs) (see Figure 2). Menus, toolbars, buttons, input windows, text editors, etc.—the list goes on. There is support for regular expressions, making it more flexible when one needs to look for patterns in data and variables. Not only does AutoIt have a sizable function library, the AutoIt community heavily contributes to that library. The best of these contributions are released into later versions of AutoIt as User Defined Functions (UDF). In addition anyone can also create their own localized function library. AutoIt allows us to compile AutoIt files to .exe files, eliminating the need for AutoIt to be installed on multiple computers in order to run AutoIt scripts. There are many more features listed on the website. AutoIt has very active online community forums with answers to common questions, example scripts, and functions that are not yet included in the AutoIt Function Library.

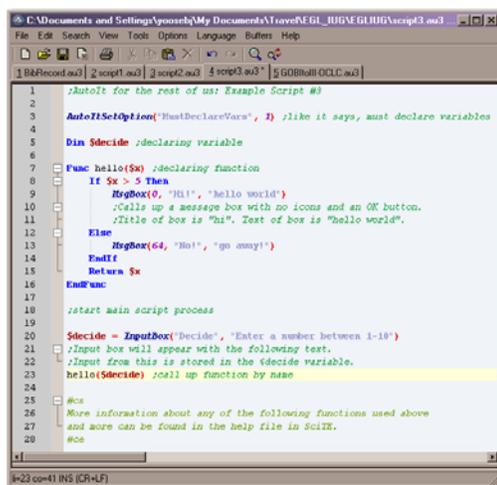


Figure 1

## Departmental Use

The Technical Services Department of Miami University Libraries has been using AutoIt for the majority of major automation scripts and macros since December of 2008. The first major AutoIt

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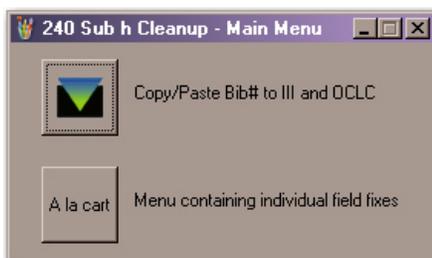
*TechKNOW* is published on the Internet by the Technical Services Division of the Ohio Library Council. It is available to Technical Services Division members at the Ohio Library Council's Technical Services Division website at <http://www.olec.org/TechnicalServices.asp> (password required) and at the *TechKNOW* mirror site at Kent State University Libraries at <http://www.library.kent.edu/techknow>. For more information, to submit articles or book or product reviews, or to be placed on an email announcement list for new issues please contact Margaret Maurer at Kent State University at 330.672.1702 or at <mailto:mbmaurer@kent.edu>. ISSN: 1939-1641. *The opinions expressed in this publication are the responsibility of the authors alone and should not be interpreted as the opinions of the OLC.*

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script dealt with a database cleanup project (zip file of scripts at <http://tinyurl.com/yff3fta>). Several thousand records for music LPs had an invalid subfield h in the 240 field. While working on these records it was discovered that there were other issues consistent within this batch, including invalid 007 field entries and outdated 305 and 262 fields. A sizable portion of the records only had the above issues, however, a batch fix would gloss over the records that had other serious issues that needed to be addressed.

The AutoIt script automated not only the correction of the field issues, but other parts of the workflow as well. The script pulled the bibliographic record number from a list in Microsoft Word and searched Millennium. After the record appeared, AutoIt copied the record information, extracted the OCLC number from that information, and searched OCLC Connexion with the number. From here, the script asked if the record did not have any other issues beyond the identified core issues, or if the record needed more work. If the record needed substantial work, the staff member chose the manual option via a toolbar with various macros to fix the core problems separately. If the record has no other major issues beyond the identified core,

Figure 2



the staff member then chose the option to have the script automatically fix the core issues. After the script copied the record information, the script used this information to predetermine what core issues to fix or update. The staff member placed the cursor in the 001 field (the start of the variable fields) and the script moved the cursor to the fields that needed to be corrected or updated. Overall, the script processed up to 90 to 100 records an hour, depending on record cleanliness. We compared that to the 40 to 50 records that the equivalent Macro Express macros processed. AutoIt proved to be a powerful alternative.

After the success of the database script, the department started using AutoIt to replace existing Macro Express macros and to further automate departmental workflows. One of the most automated workflows in the department is receipt cataloging. As an item from YBP comes into our department, it enters the receipt cataloging workflow. If the order and bibliographic records meet certain conditions—a call number is present, correct order codes, series is traced—the item is fast tracked to physical processing. Otherwise, the item is bumped to the appropriate area (serials, copy cataloging, etc.). The AutoIt receipt scripts handle most of the condition checking. Since AutoIt is able to grab and process information from the record, the script can then use the record information to check against the conditions programmed in the script. For example, the script will tell the staff person to bump an item to copy cataloging if the subfield c in the 300 field does not have a measurement. In addition, the script acts as a quality assurance tool for local codes. Again, from reading the information in the record, the script can determine which codes to insert in the item record and which codes should appear in the order and bibliographic records. A screencast of the receipt cataloging process can be viewed at <http://www.screencast.com/t/gegg952u8gS>.

Not all workflows can be fully automated. For example, copy cataloging is complex enough to make automating the entire process impractical. The copy cataloging scripts instead focus more on

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## It's All in the Cards

<http://sc.edu/library/inthecards.html>

When the University of South Carolina Libraries finally disassembled their closed card catalog they held a yearlong celebration. *It's All in the Cards* recognized the history and value of the catalog to the libraries, taking place during the 2009-2010 school year. Events included a boat race (with boats made from catalog cards) a "What can you make with catalog cards" contest and an Art Invitational. There are some wonderfully funny, creative and artistic images from the celebration at *It's All in the Cards* including a dress made from catalog cards that was entered into a recycled materials fashion show. Check it out!

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inserting the correct local codes in the bibliographic and item records. The copy cataloger can also utilize optional macro scripts, like searching Connexion and overlaying a record in Millennium with a record in OCLC. The copy cataloger can let the macro determine the correct local codes for the record, freeing up staff time to spend on more complex actions such as subject cataloging.

### Some Benefits and Challenges Using AutoIt

AutoIt's power and flexibility have proven

invaluable for workflow automation. AutoIt's language allows the macro script to take on duties that traditionally were considered very complex and time-consuming to automate. If the data can be read by the script, either by taking it directly or by copying it from the target window, then the script can parse out that information and determine the appropriate action to take. For almost all the major scripts, I have used regular expressions to parse out record information into an array variable. I can then search that array for a specific field, move that field from



the array and into its own variable, and proceed to extract specific data from that field. In addition, AutoIt does not have as many limits as other automation software. For example, Macro Express only allows for 99 text variables, while AutoIt allows for that and many more.

Two challenges stand out with using AutoIt with the III Millennium ILS: speed and windows. While AutoIt is fast, Millennium has difficulty matching the speed of the script due to Millennium being on a Java platform. That extra layer makes Millennium slower to react to the script commands. More often than not, initial script failures are due to the AutoIt script being faster than Millennium can handle. Two main workarounds combat the speed issue. The first is the *Sleep* command, which pauses the script for a predetermined amount of time before resuming. *Sleep* helps with the speed issue, but still leaves a sizable margin of error in the script since the timing with the programs can differ each time a script is run. AutoIt also has many window control functions to choose from. For example, a *WinWaitActive* function tells the script to wait until a particular window is active.

The window control workaround leads into the second issue with using AutoIt with Millennium. Again, because Millennium is on a Java platform, Millennium does not have standard windows. AutoIt is able to draw data freely from standard windows; however, Millennium windows do not allow AutoIt to harvest window text straight from the window. The workaround for this issue is to place the window text in

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## Every Vote Counts in OLC Elections

The election for OLC leadership, including Board of Directors and Division Action Council members began on June 30 and will continue until July 30. Anyone who did not receive an e-mail or print ballot can contact the OLC at <mailto:olc@olc.org> or at 614-410-8092.

Individual votes really count, especially within the smaller division races. This year Deborah Malecha has agreed to step forward from the Action Council to serve as our new Assistant Coordinator. Mike Farmer has agreed to serve as our Secretary. That leaves two open seats on the Action Council. We have four candidates for these seats:

- Connie Strait, Greene County Public Library, Xenia, Ohio
- Michael Monaco, Cleveland Public Library, Cleveland, Ohio
- Aaron Smith, Allen County Public Library, Fort Wayne, Indiana
- Pam Matthews, Cuyahoga County Public Library, Parma, Ohio

Many thanks to these folks for volunteering to serve the organization. Remember to vote early, and often!

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the clipboard and point AutoIt to grab the information from there. This workaround works most of the time and is limited to parts of the screen where automated copying can take place.

## Conclusion

Since the introduction of AutoIt in the department in 2008, AutoIt has not only increased workflow efficiency but also allowed for the expansion of automation in departmental workflows. Currently our department is working on automating one of the main ordering processes that involves working in GOBI, Amazon, Millennium, and OCLC. The entire process is too complex to automate completely, but after studying the procedure, we determined that most items go through a core process, which could be automated.

Overall, the department's experience with AutoIt has been a rewarding one. Coming from a limited programming background, the active community and excellent documentation walked us through

the functions, variables, and conditionals needed to create the scripts described above. The AutoIt scripts run consistently, with minimal crashes due to the script itself. Most importantly, AutoIt opens the automation door wide open for our department. AutoIt is easy to use to automate a vast range of tasks, from simple data entry, like typing in the infamous 504 note, to more involved decision-making processes in a workflow, like ensuring that the corresponding fixed field code matches the 504 note.



## For More Information

AutoIt Homepage, <http://www.autoitscript.com/autoit3/index.shtml>  
Scripts Using AutoIt by Harvey Hahn, <http://research.ahml.info/omi/AutoIt.html>

Note: This article is based on two presentations from the author: *AutoIt for the Rest of Us* at EGL-IUG 2009 and *Using AutoIt for Millennium Task Automation* at IUG 2010.

## A Mind-Boggling Visualization of the Metadata Universe

<http://www.dlib.indiana.edu/~jenlrile/metadatamap/>

*Seeing Standards* is an entertaining and mind-boggling map created to visualize 105 different metadata standards in relation to each other. It's an attempt to visually define the most commonly used standards, explain their relationships to each other, and express their strengths. The standards listed closest to the center of each sliver are those that are most strongly connected to the given category. The visualization is the work of Jenn Riley, Metadata Librarian, Digital Library Program, Indiana University, Bloomington, and Devin Becker, Digital Initiatives & Scholarly Communications Librarian at the University of Idaho. Check it out!

## OLC 2010 Expo: Save the Date

<http://www.olc.org/expo.asp>

The OLC Expo is the region's largest marketplace of products and services for libraries. This year's Expo will also feature stakeholders meetings, complimentary refreshments, free registration, free parking, door prizes and speakers.



The Expo is in Columbus at Ohio Expo Center's Lausche building on Friday, September 10 from 9am to 3pm. Anyone registering for the 2010 Expo by August 1 will receive a chance to win an e-reader.

## Coordinator's Corner

by Fred Gaieck, TS Division Coordinator & Librarian, Ohio Reformatory for Women

Summer has come upon us quicker than most of us have thought, and so has the arrival of the testing phases of Resource Description and Access (RDA). In theory, RDA may make cataloging easier since catalogers are to describe the item as they see it in hand rather than based on a set of rigid principles as established by AACR2. One example of what we'll see in RDA records is no more Latin abbreviations such as "et al.," "s.n." or "s.l." If an item has more than three authors or compilers, we are encouraged to exercise cataloger judgment regarding access to authors. This description of RDA was presented in a TS Division Webinar on April 28 by Magda El-Sherbini, Head, Cataloging Department, The Ohio State University Libraries. The presentation received rave reviews.

Wait a minute, you were not one of the 48 people from across the country that were able to view the presentation? There is no need to worry—the April 28 presentation has been archived at the OLC website. Anyone can view it anytime by paying a one time fee (\$10 for OLC members, \$15 for non-OLC members). Those who attended the Webinar in April receive free access by contacting Chris Korenowsky at <mailto:ckorenowsky@olc.org>. Click at <http://www.olc.org/WebinarArchive.asp> for further details.

In January Janis Young from the Library of Congress (LC) will provide a Webinar on the changing genre/form headings. Janis is a Cataloging Policy Specialist at the Policy and Standards Division and has lead recent LC work in this area. We hope to archive that presentation as well.

OLC elections began June 30. The Technical Services Division looks forward to working with the new Action Council members in 2011 as we work on the five 2011 Chapter Conferences (Central and Southeast will combine their conferences), the 2011 OLC Biennial Convention and Expo in Toledo (October 26-28), along with other projects and presentations.

The Technical Services Division brochure has been revised and is available on the OLC website

through the Division's Web page <http://www.olc.org/TechnicalServices.asp>. The Division thanks Andrea Christman and her committee for revising the brochure, and Mackenzie Betts and other OLC staff for designing and uploading the document.

If you are able to do so, please attend the OLC Expo in Columbus on September 10 (<http://www.olc.org/expo.asp>). The division will have a table at that event, so don't hesitate to stop by and see us.

Ideas for the 2011 OLC Chapter Conferences, the 2011 Convention in Toledo, along with other programming ideas are always appreciated. OLC is emphasizing collaboration among the divisions, thus programming that would work well beyond TS Division membership would also be greatly appreciated. To submit programming ideas, please contact any of the Action Council members listed on the TS Division Web page at <http://www.olc.org/TechnicalServices.asp>. Speaking on behalf of the TS Division Action Council, we look forward to meeting the needs of TS Division members.

### RDA Toolkit *Will be Available in Print*

<http://www.rdatoolkit.org/pricing>

Faced with small libraries' concerns regarding the annual cost of licensing the online *RDA Toolkit*, the co-publishers have announced they intend to make full-text loose-leaf versions available of both *RDA: Resource Description and Access* and *RDA: Element Set View*. The new products will be purchased in the same ways that AACR2 products have been purchased. More information will be available this fall.

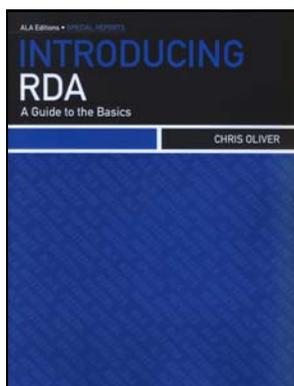
Information is also available at this link to purchase access to the online *RDA Toolkit*.

Chris Oliver. *Introducing RDA: A Guide to the Basics*. Chicago: ALA Editions Special Report, 2010. 117 p. ISBN: 978-0-8389-3594-1. \$35.00 (eEdition), \$45.00 (paperback).

The transition from the Anglo-American Cataloguing Rules (AACR2) to Resource Description and Access (RDA) represents a change of great magnitude, and change is never comfortable. That's why the reassuring tone in Chris Oliver's new *Introducing RDA: A Guide to the Basics* is so welcome. In fact, it's one of the nicest things about this new book. Somehow when Chris Oliver talks about RDA the challenges and the transitions all seem terribly reasonable and doable. Not that the author makes any attempt to mince words or make nice about the RDA transition. Rather, the genius here resides in an ability to calmly explain where we stand, how we got here and what our next steps are.

Chris Oliver has been involved with the evolution of RDA since 1997, first as a member of the Canadian Committee on Cataloguing (CCC), and more recently as the committee's Chair. She has also served as a member of the Joint Steering Committee's Format Variation Working Group and as Chair of the RDA Outreach Group. Chris has worked at the McGill University Library since 1989, beginning in rare books cataloging. She has held a variety of cataloging management positions, serving most recently as Coordinator of Cataloguing and Authorities. Chris has also given many international presentations on RDA. All of this helps explain how very authoritative the text is, how easy it is to understand and the practicality of its focus.

The book provides a basic understanding of how our work will transition once we adopt RDA. There is a good general introduction to RDA. The next chapter contextualizes RDA by describing the evolutionary relationships between RDA, Functional Requirements for Bibliographic Records (FRBR) and Functional Requirements for Authority Data (FRAD). There is a discussion on RDA's continuity with AACR2, which is followed by a chapter focus-



ing on the differences between the two standards. Next comes information on implementation, and a discussion on the advantages, present and future, of implementing RDA. The text is completed by a selected bibliography and index.

There is an especially good introduction to the use of the RDA Toolkit, including descriptions of Toolkit navigation and explanations of how the Toolkit may be integrated into our work through the use of mappings, workflows, diagrams and links between AACR2 and RDA. There is also information on the international implementation of RDA. The text is short and there is plenty of room in the margins to write notes and comments.

This is not an attempt to provide detailed training on RDA because the focus is at a more generalist level. Therefore *Introducing RDA* could provide an introduction for the uninitiated technical services librarian, for library administrators and for interested public services or systems folks. It's a good first step toward the understanding needed for application or use.

ALA is now offering an eEdition of this title, which is available for download from the ALA Store.

### *RDA: The Basics* Webinar is Available for Purchase, Download

48 people attended this live Webinar designed to prepare catalogers and other library staff for the arrival of RDA. The archive copies of this Webinar are now available for purchase and download from the OLC Webinar Archive, <http://www.ola.org/WebinarArchive.asp>. OLC members may purchase *RDA: The Basics* for \$10.00; \$15 for non-members. Anyone who purchased access to the original Webinar event may receive their free copy by contacting Chris Korenowsky at <mailto:ckorenowsky@ola.org>.

# BarTender Software Allows Dayton Metro to Eliminate Stickers, Streamline Workflow

by Andrea Christman, Catalog Librarian, Dayton Metro Library

Over the past 10 years, the Catalog Division at the Dayton Metro Library (DML) has significantly streamlined its label-making process for all formats, resulting in considerable savings for the library. Our most recent improvement has been the addition of images to the spine labels for books, replacing those extra stickers we had to purchase and apply to designate particular categories and genres.

DML migrated from DRA (Data Research Associates) to Dynix's Horizon in 2004 and our Technical Services Department took the opportunity to implement workflow changes that made our label-making process more efficient. Prior to our migration, item records were created by the public service staff when they received the item. Therefore, information for the labels was taken from the bibliographic record. Once we moved to Horizon, Technical Services assumed responsibility for item record creation. They are now created at the time of order and the catalogers add the call number to them. This means that we can use information in the item record on the labels.



We began using a third-party label design product called BarTender which is marketed by Seagull Scientific ([http://www.seagullscientific.com/asp/btw\\_table\\_of\\_contents.aspx](http://www.seagullscientific.com/asp/btw_table_of_contents.aspx)). We simply scanned the item barcodes in Horizon to access the item record information, exported the item record data to BarTender, and printed the labels. Thanks to this workflow we were able to allocate one FTE to make labels for over 200,000 items last year (amounting to over 300,000 labels) with time left over for other clean-up projects. We harvested as much data as possible from the computer to reduce (or even eliminate) the time spent on label-making and processing tasks, such as typing and stamping.



BarTender gives us complete control of what we put on our labels. It is easy to use, and can even produce barcodes. Our Catalog Division Manager, Deborah Hathaway, was familiar with the program and knew that it was possible to print an image on the spine label. DML, like other libraries, was looking to save money and she knew that this would result in a huge cost savings for the library. The new workflow replaced the category/genre stickers that we purchased from vendors, and also saved the cost of the labor associated with applying those stickers. Previously our library used a lot of category/genre stickers. To date, we have replaced approximately 25 different category/genre stickers with images on the spine labels. We added well over 5,000 new items to our mystery collection alone in 2009, and each one would have had a genre sticker applied to it.

BarTender uses Visual Basic Script, so our programmer wrote a routine to direct BarTender to the .jpg files chosen by library staff to be the im-

*CONTINUED on page 9*

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ages, and associated each image with a collection. BarTender looks at the information exported from the Horizon item record, determines what collection the item will be housed in, and inserts the image associated with that collection onto the spine label for the item. For instance, if the item is in our mystery collection it gets a picture of a skull printed below the call number on the spine label. If the item is in our Western collection, it gets a picture of a cowboy hat.

All of our labels are printed in black and white. We

use thermal printers with polyester labels, which are very durable. We researched color ribbons and they were twice as expensive as black ones, which would have impacted the economic benefits derived from printing our own images. Some public services staff, particularly the children's librarians, were hesitant to eliminate colored stickers. However, once they realized the economic advantages and were faced with the prospect of no stickers at all because of budget cuts, they were on board. Nevertheless, the lack of color continues to be the chief complaint that we hear from public service staff. We do believe that it will take time for staff to adjust to the new look and placement of the category/genre designations.

It is possible to have a workflow different from DML's and produce images on your own labels. For instance, it may be possible to load them into your printer or use another program that interacts with your integrated library system and printers.

While some staff and patrons miss the eye-catching, colored, factory-produced stickers, incorporating images on the spine labels and printing as needed from our desktop is a cost-effective way to eliminate extra stickers while keeping the same amount of information on the spines of books.

## Musing About RDA

I lament for the GMD.  
In general, my materials  
need some designation.  
How will I find in short time  
the item I want, in display?  
I am in dismay, unhappy, un-gay;  
sounds like no sway and  
my GMD option is going away?  
I lament, MARC records  
to be sent into new directions,  
descriptions of new ways to describe  
cause this scribe to ponder.  
Former learning seems to unravel  
while sorrow begins to swell  
as yesterday's good ideas  
make way for new vision.  
I am somewhat paused  
like a passenger waiting to board  
the next train, a vehicle in motion,  
and my emotions sense loss  
(which comes with any change)  
as I set my sight to rearrange  
the way I say-- what it is.  
I hesitate, investigate, sometimes  
the theory sounds great  
and yet I wait at some data-gate,  
ear to the ground, waiting for the  
whistle to sound, RDA bound,  
standing pensive.

By Jennifer Bull

## LCRI —> LCPS: Library of Congress Policy Statements

The Library of Congress (LC) is making their *Library of Congress Policy Statements* (LCPS) available for libraries. The probable successor to the *Library of Congress Rule Interpretations* (LCRI), LCPSs are being developed to offer LC test participants guidance on LC policy in the use of RDA (Resource Description and Access). It is anticipated that LCPs will be more focused, "...covering fewer topics and leaving more to cataloger's judgment than the LCRIs," according to Judith A. Kuhagen. The LCRIs will continue to be available for catalogers' AACR2 cataloging needs. LCPSs are available on the Web at [http://loc.gov/catdir/cpso/RDAtest/rda\\_lcps.html](http://loc.gov/catdir/cpso/RDAtest/rda_lcps.html) and within *Cataloger's Desktop* (make sure you've added them to your list of resources).

## US RDA Testing Period

The *RDA Toolkit* was officially released on June 23, 2010. *Toolkit* access is freely available until August 31, 2010. Information about accessing the *RDA Toolkit* during this testing period is available at <http://www.rdatoolkit.org/openaccess>.

*Resource Description and Access* (RDA) is the proposed successor to the *Anglo-American Cataloguing Rules* (AACR2). The Library of Congress (LC), the National Library of Medicine (NAL) and the National Agriculture Library (NAL), along with 23 other invited institutions, will now enter a testing period to assess the operational, economic and technical feasibility of implementing RDA. These libraries will concentrate on training and practice between now and September 30. From October 1 through December 31 2010 they will test RDA. Between January 1 and March 31, 2011, the US national libraries will analyze the results of the test. A final decision regarding US RDA implementation will then be announced.

Testing libraries will catalog a common set of resources to assess RDA's impact on original cataloging. They will catalog 10 texts, five audio visual items, five serials and five integrating resources. This methodology will show how different catalogers interpret resources and rules, because the same items will be cataloged by all the libraries. Testers will omit subject cataloging and classification from the test. They will catalog each item following AACR2 and then a different cataloger will

catalog following RDA. They will also provide a time study comparison for each item.

To assess the impact on copy cataloging, each testing institution will work with a common set of 5 items, for which LC will provide copy and surrogates. Again, they will omit subject cataloging and classification from the test. They will be asked to deal with the records according to any policies they have adopted. For example, local policy may be to accept AACR2 records as is or it may be to convert them to RDA. There may also be local policies regarding the quality of the records accepted. They have agreed to provide information to LC about these policies.

Each testing institution will create a minimum of 25 records following RDA out of their own workflows. Information about their experiences creating these records will be provided to LC.

Each institution will fill out on-going surveys and an overall survey at the end. Feedback will be collected from individual catalogers on every individual record they create. They will also be gathering information from reference librarians, users, and acquisitions staff regarding how RDA serves their needs.

Other libraries are welcome to informally follow the national testing, participating in the portions of the test that they are able to, and report results

*CONTINUED on page 11*

## New Technical Services Brochure is Now Available

Several years ago the Technical Services (TS) Division of the Ohio Library Council (OLC) created a brochure to market technical services as a career and to aid our co-workers and administrators to understand the importance of our work. The brochures were distributed widely at a variety of technical services venues, but were not readily available to division members for local distribution. The content of the brochure had also become dated. The TS Division decided to create a new brochure, one designed to be printed on any duplex color printer. The brochure is now available at

<http://olc.org/pdf/techservicesbrochure2010.pdf> or through the TS Division Web page at <http://www.olc.org/TechnicalServices.asp>. Feel free to download, print and distribute this brochure locally. In fact, keep a few copies handy to hand out to potential technical services librarians, to administrators, to co-workers who are mystified by what you do. Leave a few copies in the staff lounge, and in library brochure racks, or....



*CONTINUED from page 10*

to LC. To prepare for the test, libraries must familiarize themselves with RDA and read LC-provided resources, including *LC Policy Statements*. They must also determine their local practices and policies regarding rule application as well as copy cataloging policies. MARC21 format adjustments must be implemented in their local integrated library system (ILS). Templates and macros must also be set in place.

Obviously the benefit of local testing is that it acts as a training and preparation period for full implementation. The training and decision-making create a lot of work, but it is work that must be done

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For information on the *RDA Toolkit* visit <http://www.rdatoolkit.org>.

To access background information on the testing go to <http://www.loc.gov/bibliographic-future> and read about the recommendations made by Working Group on the Future of Bibliographic Control.

LC has posted information about the testing period at <http://www.loc.gov/catdir/cpsor/rdatest/rdatest.html>. This includes files of policy decisions and training materials developed for its testing partners. Other libraries whether participating in the RDA test or not, are welcome to use and modify these files for their local situations.

LC is also providing information about the policy choices made for the testing period at <http://www.loc.gov/catdir/cpsor/rdatest/rdachoice.html>.

Webcasts from an all-day train-the-trainer session that was offered for testing libraries in conjunction with ALA Midwinter in January 2010 are available online at <http://www.loc.gov/bibliographic-future/rda/trainthetrainer.html>.

Questions about the content of RDA and LC's documents for the RDA test should be sent to <mailto:LChelp4rda@loc.gov>.

Comparative sample records constructed under AACR2 and RDA rules are now available at <http://www.loc.gov/catdir/cpsor/rdatest/rdaexamples.html>

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locally at some point in order to implement RDA. Opening the door to informal testers also maximizes the information that LC receives and allows local libraries to impact RDA decision-making on a national level.

All of this information will be compiled and assessed. Internationally, libraries will spend the same period of time familiarizing themselves with the *Toolkit* and learning the standards. OCLC has asked that no one add RDA records to WorldCAT prior to October 1, 2010 to facilitate the testing. After the testing the records will be available on the LC website so that vendors can analyze and manipulate them for system development use.

## LCSH Terms May Now be Suggested by the General Public

For the first time ever, anyone—even a member of the general public—may suggest changes to authorized Library of Congress Subject Headings (LCSH). Or, anyone may suggest new headings. Previously catalogers could make suggestions, but these were not expedited in the same way as suggested changes from Library of Congress (LC) catalogers or members of the Program for Cooperative Cataloging (PCC) Subject Cataloging Program (SACO). But the general public? Never!

To take advantage of LC's first foray into social media, visit the LC Authorities and Vocabularies service at <http://id.loc.gov>. Select *Library of Congress Subject Headings* and bring up a term by typing in the search box while LCSH is highlighted. Select a hyperlinked term by clicking on it. Once inside any term record, click on the *Suggest Terminology* tab. Changes may be suggested to the term or new terms may be suggested. Alternatively suggestions may be sent to <mailto:jdfeedback@loc.gov>. Catalogers, in addition to the general public, may also take advantage of this option to suggest term changes.

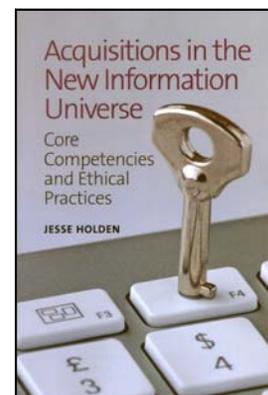
Jesse Holden. *Acquisitions in the New Information Universe: Core Competencies and Ethical Practices*. New York: Neal-Schuman Publishers, 2010. 135 p. ISBN: 978-1555706968. \$75.00 (paperback).

"The fundamental role of the library has shifted from warehousing a limited quantity of information to filtering and providing access to the seemingly infinite amount of information available today." This, the second sentence in the entire book, is at the heart of *Acquisitions in the New Information Universe*. How we acquire material has been, and is being irrevocably changed. We must transform our work by shifting it from an item-driven process populated by physical objects to the acquisition of access in a variety of contents and formats. Within this framework Holden provides a comprehensive introduction to acquisitions work, outlines a conceptual framework for acquisitions work, and thereby defines the continuing role for acquisitions practice.

Chapter one provides a brief overview of the transition from print to digital resources. The second chapter describes the paradigm shift from purchasing print to managing "spheres of access". Connecting with content, the third chapter discusses working with vendors, purchasing access online, archival rights and responsibilities, the real cost of "free" resources and ensuring access, all from the perspective of managing the work. Acquisitions is described in the next chapter as "...a service sector that adds value by acting on content and interacting with the library...." This defines acquisitions as a service function, rather than as a process, a true paradigm shift. There is a nice discussion regarding the high degree of behind the scenes mediation required to successfully deliver disintermediated access to patrons. Information is also provided on technological models for resource management (integrated library system, electronic resource management system, A-Z list, etc.).

Throughout the book Holden makes good use of figures to represent relationships, workflows and models. There is a list of selected acquisitions resources and an index. While the orientation and examples stem principally from academic library work, the principles can be more broadly applied

to the public library arena. *Acquisitions in the New Information Universe* would probably be most useful in libraries dedicating increasing proportions of their budget to the purchasing of remote electronic resources.



The author is the Coordinator of Technical Services at Millersville University Library in Pennsylvania. His career in technical services has included serving as the Ordering Librarian in the Acquisitions Department at the Stanford University Libraries and as the Acquisitions Librarian at the Stanford Law Library. He is an instructor for the ALCTS online Fundamentals of Electronic Resource Acquisitions course and a former instructor for the Fundamentals of Acquisitions course. His popular column "Acquisitions Archaeology" appears regularly in the journal *Against the Grain*. Obviously he knows what he is talking about.

While it is nice to read an acquisitions book that is theoretical, it is especially nice to see one that is both theoretical and practical. How will we perform acquisitions in the future?

## Librarians Do Gaga

[http://www.youtube.com/watch?v=a\\_uzUh1VT98](http://www.youtube.com/watch?v=a_uzUh1VT98)

Students and faculty from the University of Washington's Information School have created a take-off on Lady Gaga's *Poker Face*—one that celebrates library catalogs and databases. The viral video, available via YouTube has received almost 600,000 views and features many of the iSchool's more well-known faculty, in addition to graduating MLIS students. If you haven't already viewed it, check it out!

## LCSH Headings for Cooking and Cookbooks Have Been Changed

The ABA Policy and Standards Division of the Library of Congress (LC) has completed work to modernize subject heading treatment for cooking and cookbooks, and over 800 heading changes were made, 500 records with cross references. LC announced the intention to take on this task in September 2009 by publishing a discussion paper and calling for comments. The changes were completed in June 2010.

The term *Cookbooks* has been established as a topical subject heading and as a genre/form heading. The term *cooking* will be used to replace the term *cookery* in the subject headings. The basic structure of most of the existing headings has not been changed, but a new standard reference pattern has been established. The format of a few headings has been changed to bring them up to current standards. For example, *Mixers (Cookery)*

was changed to *Mixers (Kitchen appliances)*. The *Subject Headings Manual, H 1475 Cooking and Cookbooks* has also been revised and is available for downloading in PDF format at <http://www.loc.gov/catdir/cpsoc/h1475.html>. Most of the children's subject headings for cooking have been cancelled. For details on all of these changes, visit <http://www.loc.gov/catdir/cpsoc/cooking3.pdf>.

As records with the new headings arrive in the catalog, headings in existing bibliographic records will need to be edited and new authority records will need to be loaded. Libraries that have machine-assisted authority control will be less impacted by this task than others. Public services staff will also need to be alerted to these changes as cookbooks are popular among public library patrons.

### Library Webinars Blog

<http://neflin2.blogspot.com/>

We all enjoy Webinars. How did we ever manage our training needs without them? And how do we find even more opportunities for this convenient and flexible form of learning? Well one spot is the Library Webinars Blog, created by the Northeast Florida Library Information Network (NEFLIN) to provide Florida library staff with one location for information about Webinars—and it's useful for library staff from other states as well. Currently available Webinars are featured prominently and there is also a long list of links to Webinar providers such as ALCTS, LYRASIS and NISO. Most of the Webinars listed are free, but the ones requiring paid registrations are clearly identified. RSS and E-mail notifications are supported, and an e-mail address is provided to enable the sending of suggested Webinars. Check it out!

### MARC21 In Your Library

<http://www.marcofquality.com/trn/introductory.html>

*MARC21 In Your Library* was created by the fine folks at The MARC of Quality (TMQ). Part 1 of this popular course, *MARC and Bibliographic Information: The Underlying Fundamentals* is free, and may be scheduled for online viewing at any time. This set of modules is designed to prepare students to take Part 2, a six to eight hour workshop on MARC coding which can be delivered onsite or online. There is a charge for Part 2. Part 1 consists of a series of nine Webcasts that aim to explain what bibliographic information is, how it relates to MARC records, what MARC records are, and how MARC relates to library catalogs. Directors, reference people, acquisitions people, copy catalogers and apprentice catalogers would all benefit from this course. Online training tools that introduce people to MARC21 are invaluable because they can be flexibly scheduled, and because the learner can choose their own educational paths within the modules. And this is a good one. Check it out!