



Minutes
Bibliographic Standards Committee
ALA Midwinter Conference 2016
Saturday, January 9, 2016, 8:30-11:30 am
Westin Copley Plaza – Staffordshire
Boston, MA

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 2. Settlement of the agenda
 3. Approval of Annual 2015 minutes
 4. Updates from BSC Chair
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 6. DCRM(C): Descriptive Cataloging of Rare Materials (Cartographic) (Kandoian) *
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 11. CC:DA Report (Haugen)
 12. Report on OCLC and Rare Materials Survey (Folsom)
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**Asterisk denotes agenda items that were reordered due to various issues.*

1. Introduction of members and visitors

Members present: Nina Schneider, Clark Library, UCLA (Chair); Marcia Barrett, University of California Santa Cruz; Valerie Buck, Brigham Young University (Secretary); Jane Carpenter, UCLA (ex-officio: Controlled Vocabularies editor); Lori Dekydtspotter, Lilly Library, Indiana University; Christine DeZelar-Tiedman, University of Minnesota; Emily Epstein, University of Colorado, Health Sciences Library; Asheleigh Folsom, Georgetown

University; Matthew Haugen, Columbia University (CC:DA liaison) ; Linda Isaac, University of Miami; Francis Lapka, Yale Center for British Art (ex-officio: DCRM Task Force chair); Margaret Nichols, Cornell University; Allison O'Dell, University of Florida; Audrey Pearson, Yale Beinecke Library; Amy Tims, American Antiquarian Society.

Visitors: Erin Blake, Folger Shakespeare Library; Katelyn Borbely, ProQuest; Morag Boyd, Ohio State University; Amy Brown, Harry Ransom Center; Annie Copeland, Pennsylvania State University; Diane Ducharme, Yale Beinecke Library; Nancy Kandoian, New York Public Library; Martha Lawler, Louisiana State University, Shreveport; Deborah J. Leslie, Folger Shakespeare Library; Megan McNiff, Harvard Houghton Library; Honor Moody, Harvard Schlesinger Library; Kate Moriarty, Saint Louis University; Ann Myers, Stanford University; Karen Nipps, Harvard Houghton Library; Iris O'Brien, The British Library; Phyllis Payne, Boston University; Katy Rawdon, Temple University; Elaine Shiner, Harvard Houghton Library; Stephen Skuce, Massachusetts Institute of Technology; Nicole Smeltekop, Michigan State University; Aislinn Sotelo, University of California, San Diego; Gioia Stevens, New York University; Elizabeth Sudduth, University of South Carolina.

Members absent: Ellen Cordes, Yale Lewis Walpole Library; Nancy Lorimer, Stanford University; Leslie Waggener, University of Wyoming

2. Settlement of the agenda

There were no adjustments to the agenda.

3. Approval of Annual 2015 minutes

The minutes were approved pending minor corrections.

4. Updates from BSC Chair

1. The DCRM Task Force was invited to present a morning session at the November 2015 JSC [now RSC¹] meeting at the National Library of Scotland. They also presented a full-day seminar on RDA and rare materials. BSC and the DCRM Task Force look forward to working in the future with more international colleagues in some form of RSC Working Group for Rare Materials.
2. Thank you to Audrey Pearson who finished migrating Latin Place Names to the new RBMS platform.
3. Jason Kovari and colleagues at Cornell are putting together a grant to do data elements and ontologies, outlined in the report Schneider distributed before the conference on Linked Open Data. Kovari, et al., if funded, are interested in input from BSC. (The report is included below in Appendix A.)

¹ The Joint Steering Committee for the Development of RDA (JSC) is now the RDA Steering Committee (RSC).

[Agenda reordering: At this point Schneider gave a cursory summary of the activities for both Items 5 and 6, as no representatives for DCRM(M) or DCRM(C) were present. After moving on to Item 7, Nancy Kandoian arrived. She gave a more thorough report for Item 6 after Nichols finished reporting for Item 7. Thus Item 6 follows 7 in the Minutes. During the Break, Schneider received an email from Lorimer for Item 5, which she reported following the Break (Item 5 follows 9).]

7. DCRM(MSS): Descriptive Cataloging of Rare Materials (Manuscripts) (Nichols) *

Margaret Nichols reported that the editorial team received comments back from LC, CC:DA, and others. Reviewing these comments will be the focus of their meeting on Monday. Nichols asked about whether or not an index is needed because of the ease of online searching. Schneider strongly advised the inclusion of an index. Schneider will look into getting funds to hire an indexer.

The editorial team hopes to complete DCRM-MSS for a vote before Annual 2016.

6. DCRM(C): Descriptive Cataloging of Rare Materials (Cartographic) (Kandoian) *

Nancy Kandoian announced that DCRM for Cartographic was finished just two days ago. Color and image for the cover are still to be determined. The vote will be issued on ALA Connect by January 29th, followed by a consent agenda at Annual 2016.

Kate Moriarty asked about the inclusion of an index. Kandoian said that no index had been created. Schneider strongly advised the inclusion of an index, joined by a consensus from the room. Schneider will look into getting funds to hire an indexer. Deborah Leslie emailed contact information for an indexer to Schneider.

Allison O'Dell requested that DCRM manuals be uploaded online as chapters instead of as one long PDF so users don't have to scroll down interminably for something several chapters in. However, most in the room voiced concern about the division of manuals. Instead, it was suggested that the PDFs incorporate the bookmark function, which provides links from a table of contents. Schneider will investigate.

The editorial team has been approved to present a workshop on DCRM(C) at the RBMS Conference 2016.

[N.B. The BSC voted 100% in favor of publication of DCRM(C) in polls that closed on January 26, 2016. The vote will be ratified on the consent agenda at Annual 2016.]

8. Controlled Vocabularies Editorial Group (Carpenter/O'Dell/Brown)

Jane Carpenter reported that the group has been meeting bi-weekly since Annual 2015. They are working to finish all terms lacking scope notes. Integration is projected to be completed by Annual 2016.

O'Dell and Amy Brown presented their Linked Open Data Report, summarizing the issues of publishing *Controlled Vocabularies* as linked data. (The report is included below in Appendix A.) The desired result is to enable rare materials and special collections catalogs to integrate with and become discoverable on the Semantic Web. It is projected that publication as linked open data will also streamline library workflows (especially in authority control). The investigators studied three options for hosting CV and chose the RBMS.info site. They are now investigating TemaTres and Vitro (Jason Kovari at Cornell) as options. The investigators recommend that CV get its own sub-domain so it won't overload the RBMS.info server.

Schneider asked whether either option will be sustainable by volunteers on the CV committee. O'Dell said that navigation and the administrative interface are simple to use; Cornell can help provide support as well.

Schneider asked if there is a way for the linked data to live in a MARC record; can you put URIs in a bibliographic record? O'Dell said that they will look into making this workable with the MARC environment.

Carpenter reminded the room that the CV editorial group is presenting their report in more detail at 1 p.m. today.

9. Revision of Standard Citation Forms for Rare Materials Cataloging (Barrett/Myers)

Marcia Barrett reported that the Standard Citations Forms (SCF) editorial team added thirteen new bibliographies to the SCF database since Annual 2015. Over a five-month period, there has been a monthly average of 475 users, 901 sessions, and 2020 page views on the web site.

The group also clarified the instructions for citing numeration in works with numbered entries, and added this to the web site.

The group received a request to put forth a proposal to update the MARC21 documentation for the 510 field. They decided to wait for the outcome of the proposal to the RSC on reference relationships in RDA (see Item 11).

Ann Myers stated that she can send an email once a month to the DCRM-L list summarizing new entries. Leslie suggested also putting updates on the RBMS News Blog.

Schneider advised the SCF team that Amy Tims might be able to help them develop a procedural workflow document, which can be added to the RBMS web site, for how to upgrade ILSs with the new forms.

[The committee took a 20 minute break]

5. DCRM(M): Descriptive Cataloging of Rare Materials (Music) (Schneider for Lorimer) *

Schneider reported for Nancy Lorimer. The main body of work was completed a few days ago. Lorimer is finishing the index. As the Music Library Association will be having a meeting in March, Lorimer hopes to have a close reading of DCRM(M) by late January or early February. Thus BSC members will be receiving assignments for this from Schneider via email.

10. BSC-sponsored RBMS Conference programs

(2016) – Coral Gables, FL

1. Workshop: DCRM(C) (Kandoian)

This will be a full-day workshop using the newly updated DCRM for Cartographic manual. Todd Fell, Randy Brandt, and Nancy Kandoian will be the instructors.

2. Seminar: Succession planning (Isaac/DeZelar-Tiedman)

This seminar is titled “Succession Planning for Rare Materials Cataloging.” The three invited speakers are Deborah J. Leslie, Folger Shakespeare Library; Lori Dekydtspotter, Indiana University Bloomington; and Colleen Barrett, Philadelphia Rare Books & Manuscripts Company.

3. Seminar: “Linked Data Consumption for the Rare Materials Librarian: An Introduction and How-To” (O’Dell)

This seminar will be helpful for librarians in both the public side and cataloging side in demonstrating the use and benefits of linked data. (See Appendix B.)

(2017) – Iowa City, IA

A workshop spot has been reserved for the newly updated DCRM(M) manual.

BSC still needs seminar ideas for 2017. Schneider recommended to Nichols that she submit a proposal to Workshops and to Seminars for DCRM(MSS). O’Dell suggested a seminar on artist book thesauri; also one on contemporary artists materials. Schneider asked everyone to think of ideas and talk to her.

The deadline for proposals is June 3, 2016.

11. CC:DA Report (Haugen)

Matthew Haugen, RBMS liaison to CC:DA, reported that no new business from BSC/RBMS will be brought to CC:DA during Midwinter meetings. He predicted that RSC will likely bring up the matter of Transcription vs. Recording at Annual 2016 (or in the near future), and BSC may wish to respond.

Haugen reported that most proposals sent to RSC relating to rare materials were rejected or postponed. Those that were accepted are being refined into final versions and will likely be published by April. The proposal seeking revisions to RDA to accommodate descriptions of referential works, such as Standard Citation Forms (in the 510 field), was not accepted, although issues were referred to the Relationship Designators Group. Haugen will be reworking this proposal by June 1st for resubmission.

Haugen also reported that RSC envisages establishing an Archives Working Group and a Rare Materials Working Group, both with international representation, to better address rare materials concerns in RDA in the future (see also Item 13).

Haugen invited everyone to the CC:DA meeting Monday morning to hear Gordon Dunsire, chair of RSC, speak about the evolving issues in RDA.

Haugen's full report is included below in Appendix C.

12. Report on OCLC and Rare Materials Survey (Folsom)

Asheleigh Folsom reported on the survey she, Allison Rich, and Audrey Pearson conducted to discover how rare materials people (catalogers, researchers, vendors, curators, collectors, etc.) use institutional records in OCLC, and whether they have ever used LBD (Local Bibliographic Data). Several respondents did not know what an LBD is. Several serious concerns were raised by respondents that need to be presented to OCLC. (The report is included below in Appendix D.)

Schneider reminded everyone that the impetus for this survey came out of the discussion at Annual 2015 led by Jackie Dooley of OCLC. In this discussion, many concerns were expressed by special collections catalogers and librarians about the loss of copy-specific data when institutional records will no longer be available.

The survey received about 220 responses. Folsom asked the room for suggestions about how best to present the gathered information to OCLC. Suggestions included putting together the biggest concerns and questions into a paper to send to OCLC; OCLC can then prepare a response for Annual 2016. Another suggestion was to create a document including what the ideal solution is for rare materials people, carefully articulated, and couched in terms that don't assume catalogers as the only audience.

Folsom asked for volunteers to collaborate with her on this document for OCLC. Interested individuals should contact her.

13. DCRM Task Force (Lapka)

Lapka provided more details about the RDA Steering Committee (RSC) meeting in Scotland in November 2015. The RSC intends to create working groups for rare materials and for archival materials, with tasks and membership still to be determined. It is conceivable that members of RBMS will make up part of one or both of these new working groups.

The 2016 RSC meeting will be in Frankfurt, Germany, in November. Hosting the meeting in Germany is a demonstration of the RSC's desire to increase RDA adoption in Europe and beyond. Much of what RSC is discussing this year involves the models underlying RDA, especially harmonization with the forthcoming FRBR Library Reference Model (a consolidation of FRBR and its sister models for authority data and subject data). The specification of the FRBR LRM is anticipated to be issued during the first half of this year for review. Pat Riva, the Canadian representative to RSC, has published a paper discussing this, which Lapka recommends.² Lapka also recommends that all interested attend the CC:DA meeting Monday morning to listen to Dunsire speak.

Lapka reported that one RDA issue that affects DCRM is the treatment of normalized transcription. In the next couple of years RDA will probably introduce several options for transcribing. Details are still emerging. The TF will continue to correspond with the RSC to discuss the issue.

The primary focus of the task force is RDA chapters concerning Manifestations and Items, and about half of this work is now complete. The TF charge expires in June 2016. Schneider asked how much longer Lapka thought the TF would need. Lapka suggested a renewal of one year and consideration at the end of that year for how much more time is needed.

Leslie brought forward the issue of adding clarifying data in brackets in the bibliographic record, particularly in the date and place of publication fields. The concern is whether this interpolation should happen in the actual field or whether to add it only in a note. Discussion ensued about what impact future technical maneuverability and displays will have on this issue, especially with MARC eventually becoming obsolete. This conversation will continue on DCRM-L.

Leslie brought forward the issue of adding clarifying data in brackets in the bibliographic record, particularly in the date and place of publication fields. The concern is whether this interpolation should happen in the actual field or whether to add it only in a note. Discussion ensued about what impact future technical maneuverability and displays will have on this issue, especially with MARC eventually becoming obsolete. This conversation will continue on DCRM-L.

14. Task Force to Explore Data Elements for Rare Materials (O'Dell)

Allison O'Dell reminded the room that the TF has been charged with identifying data elements used by rare materials catalogers. This information, once collected and analyzed, will hopefully better inform future schemas. The TF has compiled a list of thesauri, controlled vocabularies, and data standards. O'Dell read the list aloud and added more

² RIVA, Pat and ŽUMER, Maja (2015) *Introducing the FRBR Library Reference Model*. Paper presented at: IFLA WLIC 2015 - Cape Town, South Africa in Session 207 - Cataloguing. See <http://library.ifla.org/1084/1/207-riva-en.pdf>.

suggestions from the room. If the TF is ready by Annual 2016, Schneider asked them to report on what the recommended next steps will be.

15. Announcements from the floor

Several open positions were announced.

16. Adjournment

Schneider adjourned the meeting at 11:13 am.

--Respectfully submitted by Valerie Buck, RBMS Bibliographic Standards Committee Secretary.

APPENDIX A: Linked Open Data Report of the Controlled Vocabularies Editorial Committee

Rare Books and Manuscripts Section Controlled Vocabularies Editorial Committee Linked Open Data Report ALA Midwinter 2016

Amy Brown
Allison Jai O'Dell
Amber Billey

INTRODUCTION

Publication of the RBMS *Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging* (RBMS-CV) as Linked Open Data will enable rare materials and special collections catalogs to integrate with and become discoverable on the Semantic Web. Publication as Linked Open Data will also streamline library workflows -- especially reducing the labor in authority control -- and support broader initiatives in the library profession, such as BIBFRAME.¹

At the 2015 ALA Annual Conference and Exhibition, the RBMS Controlled Vocabularies Editorial Group charged a working group to investigate and recommend a solution for publication of the RBMS *Controlled Vocabularies* as Linked Open Data. This document summarizes the findings of the working group (Amber Billey, Allison Jai O'Dell, and Amy Brown, in consultation with Jason Kovari), and presents a solution for management and publication of library thesauri as Linked Open Data, within the context of a collaborative and dynamic editorial workflow.

Summary of recommendations:

- Host and publish the *Controlled Vocabularies* on a new domain or subdomain
- Migrate to a Linked-Data-friendly Content Management System
- Create meaningful Linked Open Data during the editorial process
- Provide multiple points of access to the Controlled Vocabularies as Linked Open Data, including a human-readable, searchable, and browsable front-end interface, data export options in Linked Data formats, a SPARQL endpoint, and periodic data dumps to the Library of Congress Linked Data Service.

BACKGROUND

The RBMS *Controlled Vocabularies*

"The *Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging*, [is] developed and maintained by the Bibliographic Standards Committee of the Rare Books and

¹ For an explanation of BIBFRAME, see: <http://www.loc.gov/bibframe/>

Manuscripts Section (ACRL/ALA). [The] thesauri provide standardized vocabulary for retrieving special collections materials by form, genre, or by various physical characteristics that are typically of interest to researchers and special collections librarians, and for relating materials to individuals or corporate bodies.”²

Linked Data

Linked Data refers to a set of principles that confer machine-actionable, semantic meaning to data using Web technologies. This is achieved with the Hypertext Transfer Protocol (HTTP) for data communication, Uniform Resource Identifiers (URIs) for a kind of authority control, and a simple, three-part data structure known as a triple (specified by the Resource Description Framework, or RDF³). A brief explanation of the principles and mechanics of Linked Data is given below. Benefits of Linked Data include connected information networks, ease of data merger, knowledge inferencing, search engine optimization, and more.⁴

The World Wide Web has historically relied on Hypertext Markup Language to encode and link documents. HTML encoding results in content that is semantically meaningful to humans, but not to machines. For instance, in an HTML document, the statement:

```
<p>John Steinbeck is the author of <i>The Grapes of Wrath</i>.</p>
```

can be interpreted by a human as semantically meaningful pieces of information (e.g., that John Steinbeck is a person and a writer, who authored a book called *The Grapes of Wrath*). Humans use context and semantics to derive information from this statement -- but machines must rely on mark-up formats to interpret data. HTML mark-up supplies formatting information alone. Linked Data formats supply the context and semantics that machines need to understand and use information. This is done by defining things with URIs and making assertions about them through relationships. Relationships are made explicit through the use of triples, which are three-part statements that contain a subject, predicate, and object, thereby relating the subject data to the object data. Using our example above, we could write the triple statement:

```
“John Steinbeck” “author” “The Grapes of Wrath”.
```

And using URIs:

```
<http://viaf.org/viaf/96992551>  
<http://schema.org/author>  
<http://www.worldcat.org/oclc/289946>.
```

This tells a machine unequivocally the same information and meaning that a human interprets in reading the original sentence.

² <http://rbms.info/vocabularies/>

³ <http://www.w3.org/RDF/>

⁴ Library Linked Data Incubator Group, “Benefits.” <http://www.w3.org/2005/Incubator/lld/wiki/Benefits>

In order for triples to make sense to a machine, the subject and predicate data must be defined by a URI. Furthermore, these URIs should be stable in perpetuity and dereferenceable, meaning that information will be returned when a human user or robot accesses that URI.

The Semantic Web is the desired outcome of Linked Data implementation -- a Web where the data in documents is discoverable, connectable, and re-purposable.⁵ Using the simple triple structure and URIs, data can be understood and processed by machines, heterogeneous data sources can be merged, and new inferences can be made from combined data sets.

The *Controlled Vocabularies* can contribute to the Semantic Web by creating URIs for RBMS- CV concepts and by offering useful information in Linked Data formats when those URIs are dereferenced. Currently, the *Controlled Vocabularies* support human understanding of data and the relationships between data. Publication of the RBMS-CV as Linked Data will additionally enable machine understanding of the data contained, ultimately supporting such initiatives as BIBFRAME, automated resource description, global data integration, Web-based discovery, and the Semantic Web.

Impetus

A need arose for a new management solution to support production and publication of the RBMS-CV as Linked Data. The current content management system, MultiTees, is client-based and requires ongoing maintenance to publish new concepts. Static HTML pages are generated from a SQL database, and manually uploaded to the rbms.info site. We could upgrade to the MultiTees Online (cloud-based) version for a fee, however the hosting is maintained by MultiTees. This means that the vocabulary would reside at multitees.org or on MultiTees servers. So, with MultiTees, there is no cloud-based option that will give us full control to manage the vocabularies. Most importantly, there is no way to openly query and access the metadata in MultiTees through the Web, as it does not have an API or SPARQL endpoint.

With the issues of MultiTees in mind, it was desirable to investigate other options -- especially considering the increase of open source Linked Data vocabulary services and software being developed by the library and information community.

Charge

A working group of the RBMS Controlled Vocabularies Editorial Team was charged to investigate and recommend a solution for publication of the RBMS *Controlled Vocabularies* as Linked Data. The group identified three primary options at the outset of the project. These options are outlined briefly here, in no particular order, and discussed in depth later.

- Allow the Library of Congress to host the vocabularies solely at their <http://id.loc.gov>

⁵ <http://www.w3.org/standards/semanticweb/>

authorities website. This option was attractive because it guarantees high visibility within the heavily-used and well-known Library of Congress network. However, it has significant workflow implications, and would necessitate RBMS losing some control of vocabulary maintenance.

- Host the vocabularies locally on a new subdomain, using either the software TemaTres or Vitro. This option allows for complete control to remain with the Controlled Vocabularies Group, but necessitates that we take sole responsibility for technical support.
- Partner with the Library of Congress Genre & Form Terms (LCGFT) and maintain the vocabularies only in partnership with the Library of Congress. We would serve in an advisory role as an expert community, but would not maintain oversight of the vocabularies.

Metrics

The solution must:

- Meet the research and cataloging needs of the rare materials and special collections community
- Allow publication of the RBMS-CV concepts as dereferenceable URIs in Linked Data format(s)
- Be simple enough for execution by a small volunteer organization

INVESTIGATION

The first route we considered was migrating the vocabulary to a central linked data vocabulary service. We contacted Nate Trail at the Library of Congress to explore moving the RBMS vocabularies to <http://id.loc.gov> -- the Library of Congress Linked Data Service (ID.LOC). ID.LOC would only be able to provide a front-end public access to the vocabularies. There is not web-based back-end management utility, and therefore it would not support the current RBMS workflows. As a result, it was recommended that we continue to maintain a separate instance of the vocabulary and send periodic data dumps to ID.LOC to publish the vocabularies through their service. While ID.LOC is not a one-stop solution for the RBMS vocabularies Linked Data problem, it will still provide a highly visible and accessible option for publishing and promoting the vocabularies. Duplication in two separate domains is not a concern as the terms can be linked with a sameAs relationship in their metadata.

Another option was to move the RBMS vocabularies to the Open Metadata Registry (<http://metadataregistry.org/>). After some consideration, this option was dismissed because it does not have the same management functionality as other tools so terms would have to entered manually/individually. We were also not confident in its lasting stability, since the RDA vocabularies no longer use it.

The last vocabularies service option considered was to merge the RBMS Vocabularies with the Library of Congress Genre and Form Terms vocabulary. We felt that this would be a tremendous loss of the unique RBMS vocabularies brand and product, and we cannot vote to dissolve ourselves.

With none of the Linked Data services meeting the desired requirements, we investigated software solutions to host and publish the Controlled Vocabularies ourselves.

SOLUTIONS

Host and publish the *Controlled Vocabularies* on the rbms.info domain

Currently, the *Controlled Vocabularies* are published at <http://rbms.info/vocabularies/>. Use of the rbms.info domain firmly establishes the identity of the RBMS-CV as an RBMS publication. To simplify the base URI pattern, we suggest using a subdomain, rather than a subdirectory -- that is, <http://vocabularies.rbms.info>. The RBMS Web Team is aware of, and has approved, this change.

Migrate to a Linked-Data-friendly Content Management System

In order to publish the RBMS *Controlled Vocabularies* as Linked Data, it is prudent to use a content management system (CMS) designed for Linked Data formats and links to external resources. This will allow us to create rich data during the research and editorial stages. The working group has identified two platforms for managing the *Controlled Vocabularies* as Linked Open Data:

TemaTres is a free, open-source content management system for knowledge organization systems (KOS) – such as library thesauri, taxonomies, ontologies, glossaries, and controlled vocabulary lists. TemaTres runs on a Web-server, and requires only PHP, MySQL, HTML, and CSS. The RBMS Web Team is prepared to run TemaTres in our existing hosting solution. Thus, using TemaTres requires no additional cost. Additionally, it is simple to install and straightforward to use.

A major benefit of TemaTres is that back-end users can have varying privileges to add, edit, or suggest concepts. This facilitates the RBMS-CV workflow wherein the Editorial Group drafts concept documentation, and opens up these drafts for public comment. Currently, this workflow is facilitated by three tools (the MultiTes CMS, a pbworks wiki,⁶ and the RBMS *Controlled Vocabularies* Community Discussion⁷). TemaTres would allow us to centrally manage this information and save time.

Vitro was developed to support the VIVO project for connecting researcher information. Vitro is a generalizable RDF instance editor and can be configured for a variety of purposes, including

⁶ <http://rbmsthesauri.pbworks.com/>

⁷ <http://rbms.info/cv-comments/>

thesaurus production. Vitro runs on a Java servlet, and would require an additional server environment at approximately \$10/month.

Both TemaTres and Vitro provide a back-end administration and editing interface, as well as a front-end user interface for searching and browsing the *Controlled Vocabularies*. Both are cloud-based, and run on common Web technologies. Both will output to Linked Data formats (SKOS, JSON-LD, etc.) and both offer a SPARQL endpoint for querying the data. Both TemaTres and Vitro will aid the Editorial Team's workflows and publication of the RBMS-CV as Linked Data.

Create meaningful Linked Open Data during the editorial process

Using either TemaTres or Vitro, output to Linked Data formats is seamless. And both CMSs will generate stable and dereferenceable URIs for concepts. However, the Editorial Team needs to choose a base URI pattern. We recommend either using the subdomain <http://vocabularies.rbms.info/>, or else choosing a new domain, such as <http://www.rbmscv.org>.

When the RBMS-CV data is migrated, existing relationships between resources (broader term, narrower term, related term, see, and see also) will be used to inform links within the *Controlled Vocabularies*. However, to create more beneficial, five-star Linked Open Data, which connects the *Controlled Vocabularies* with other Web resources,⁸ the Editorial Team should begin capturing links to external vocabularies. As part of the research process for each new RBMS- CV concept, the Editorial Team identifies related concepts in other vocabularies. We recommend capturing this data within the RBMS-CV Linked Data set. We also recommend reviewing existing concepts and adding links to external datasets -- in particular, the Library of Congress Linked Data Service and the Art & Architecture Thesaurus.

Provide multiple points of access to the *Controlled Vocabularies* as Linked Open Data

Access to the RBMS *Controlled Vocabularies* as Linked Open Data may be granted through several means. Both TemaTres and Vitro offer a human-readable, searchable, and browsable front-end interface, data export options in Linked Data formats, and a SPARQL endpoint.

Additionally, we recommend periodic ingest of the *Controlled Vocabularies* into the Library of Congress Linked Data Service (ID.LOC). This will increase exposure for and use of the RBMS- CV. But doing so will require maintenance of relationships between the RBMS-CV and the Library of Congress authorities and vocabularies. Since external links are already recommended (to produce five-star Linked Open Data), this activity is not a burden, but a bonus. Nate Trail at the Library of Congress recommended this approach, and is aware of our intention to submit data dumps to ID.LOC.

⁸ For an explanation of the five-star system, see: <http://www.w3.org/DesignIssues/LinkedData.html>

NEXT STEPS

1. Choose domain or subdomain and base URI pattern
2. Install test instances of Vitro and TemaTres
3. Assess usability of both tools and implement preferred option
4. Review and enhance links in existing data, including links to external vocabularies
5. Simplify Editorial Group workflow around the new CMS and to create five-star Linked Data.

CONCLUSION

Because both TemaTres and Vitro provide the necessary components for releasing the RBMS- CV as Linked Data, we recommend installing an instance of both on a newly established controlled vocabularies subdomain, which will necessitate an additional \$10 per month hosting cost. The Controlled Vocabularies Editorial Group will test both software installations and implement the best option based on usability, ease of support, and overall functionality. Once an implementation decision has been made, we will migrate the latest data from MultiTres and dismantle the current rbms.info/vocabularies site. At this point, we will also begin work on developing the relationships necessary for five-star Linked Data.

Appendix B: Seminar Proposals

Linked Data Consumption for the Rare Materials Librarian: An Introduction and How-To

The *English Short Title Catalog* (ESTC) and the *RBMS Controlled Vocabularies for Use in Rare Book and Special Collections Cataloging* (RBMS-CV) are now published as Linked Data. What does this mean? And how can Linked Data formats empower the RBMS community to improve workflows, bolster discovery, and enhance research? This educational seminar will provide an overview of each publication and the benefits of its new data format, followed by practical (and accessible!) instruction for working with these publications as Linked Data. Examples will include cataloger tasks (e.g., linking to an external authority resource, ingesting contextual information), curatorial tasks (e.g., uncovering related material and collections, building connections and stories via raw data), and user tasks (e.g., discovering special collections material in search engines).

Presenters:

Allison Jai O'Dell

Metadata Librarian, University of Florida

(352) 273-2667 | ajodell@ufl.edu

Amber Billey

Metadata Librarian, Columbia University

(212) 851-2452 | amber.billey@columbia.edu

Brian K. Geiger

Director of the Center for Bibliographical Studies and Research, University of California, Riverside

(951) 827-5841 | brian.geiger@ucr.edu

Moderator:

Amy Brown

Librarian, Book Cataloging, Harry Ransom Center

512-232-6434 | amyfbrown@austin.utexas.edu

Appendix C: Report of the RBMS Liaison to CC:DA

Report of the RBMS Liaison to CC:DA, January 2016

The CC:DA met during ALA Midwinter after the BSC meeting on Saturday, January 9 and again on Monday, January 11. The full agenda, with links to reports given during the meetings, is available here: <http://alcts.ala.org/ccdablog/?p=2504>

CC:DA activities since Annual 2015:

CC:DA formed a task force to review DCRM(MSS) and provided comments to the editorial team, as it did for all of the other modules, except (G).

2015 JSC/RSC Proposals and Activities:

Thank you to all who provided feedback during the past round of proposals considered at the JSC (now RSC) meeting in November 2015. Several proposals were out of scope for rare materials concerns. A summary of the outcomes is available in the report of the ALA Representative given at the CC:DA meeting.

<http://alcts.ala.org/ccdablog/wp-content/uploads/2016/01/RSCrep-kpg-2015-1-rev.pdf>

Rejected/deferred/tabled proposals:

Those proposals and discussion papers which generated the most interest for rare materials concerns were either rejected due to lack of support among the RDA constituencies, or deferred to existing working groups, or tabled in anticipation of larger revisions to the RDA Toolkit structure or to the functional models underlying the instructions (consolidation of the FRBR, FRAD, FRSAD models under the Library Reference Model¹). Details on the outcomes and actions related to these proposals will be published by the RSC Secretary at rda-rsc.org. Action on outstanding issues that were deferred or tabled may still move forward in the form of new proposals or working group charges in future proposal cycles.

1. 6JSC/ALA/45: Referential relationships: RDA Chapter 24-28 and Appendix J

This proposal was sponsored by the BSC. Outcome: Rejected. The RSC determined that referential relationships are not WEMI-to-WEMI relationships. Instead, this is a subject-like relationship between the manifestation or item being described and a separate description of it.

The WEMI-WEMI “Cross-entity” issue in Chapters 24-28 and Appendix J is being referred to RSC Relationship Designators Working Group. The forthcoming Rare Materials working group may continue work on other aspects of this issue. If needed, we will submit a follow-up proposal treating references as a type of identifier for manifestations and items, in RDA chapter 2.

2. 6JSC/BL/26: 2.7 Production Statement: changing method of recording

Outcome: Rejected in favor of developing a self-described vs. non-self-described approach. Follow-up work: • Fast track proposal from the UK to redefine “inscription” and to add something

¹ Riva, Pat and Maja Žumer. Introducing the FRBR Library Reference Model. <http://library.ifla.org/1084/1/207-riva-en.pdf> .

to production method (3.9.1.3) that uses this term. Anticipated for the RDA Toolkit April Update. • Major revisions will need to be folded in to the expected redesign of RDA

3. 6JSC/BL rep/2: Simplification of RDA 2.7-2.10 (Follow up to 2014 BL Rep proposal)

Outcome: Action deferred, due to the JSC Working Principle. However, there was general agreement that RDA should be developed to include a new generic modeling solution for manifestations that clearly separates transcribed information from recorded data. This would include creating a second set of elements for manifestation-related recorded data. Follow-up work: The RSC Secretary will clarify RDA 1.4 (Language and Script) and RDA 1.7 (Transcription) regarding transcription and transcribed elements. The RSC will keep in mind the longer-term issues.

Accepted with modification:

Some of the proposals of more moderate interest were accepted with modification. The exact nature of those modifications won't be available until the RSC secretary publishes final versions at rda-rsc.org, and are not considered official until implemented in the RDA toolkit update in April 2016.

1. 6JSC/ALA/38: Create RDA 2.17.14, Note on Identifier for the Manifestation
2. 2. 6JSC/ALA/42: Clarify Sources of Information for Statement of Responsibility Relating to Title Proper (RDA 2.4.2.2, etc.)
3. 3. 6JSC/CCC/16: Transcription of punctuation and symbols (1.7.3, 1.7.5)
4. 4. 6JSC/CCC/18/rev: Recording numbering for a series (2.12.9.3)
5. 5. 6JSC/LC/32: Revision to instructions for devised titles in RDA 2.3.2.11

Discussion papers:

6JSC/ALA/Discussion/5: Machine-Actionable Data Elements for Measurements, Extent of the Carrier, Pagination and Foliation, Dimensions, Extent of the Content, and Duration – Discussion Paper (2015)

Outcome: General agreement that: 1) RDA needs to support both machine-actionable and human-readable data. 2) Additional work on this project should continue.

The RSC also imposed a moratorium on relationship designator proposals. Proposals can still be submitted to the PCC Standing Committee on Standards (<http://www.loc.gov/aba/pcc/scs/RD-Requests.html>), or we can continue to use the RBMS relators.

Fast-track proposals:

Members of the DCRM Task Force and Controlled Vocabularies Committee advised the JSC on fast-track proposals to add new glossary definitions for *scrolls* and *folded sheets*, and also submitted a proposal to revise the glossary definition of *double leaves*. Substantial refinement to the proposed definitions took place in the review process, with our input. Final versions will be published by the

RSC Secretary on the RSC website (rda-rsc.org) prior to being added to the RDA glossary in February 2016.

Governance and name changes:

The JSC (Joint Steering Committee) has been renamed the RSC (RDA Steering Committee). In an effort to represent international and specialist needs, the RDA Steering Committee will increase the number of specialist working groups including a new Archives Working Group and a rare materials working group, expand regional representation into new areas, and merge current representation of ALA, LC, and CCC (Canadian Committee on Cataloging) into a single North American representative to the RSC. While this adds to the distance between ALA/CC:DA and the RSC, the formation of the Rare Materials WG will probably give our community a more direct voice in the development of RDA in collaboration with international rare materials expertise. The representation of RBMS at the CC:DA level will nonetheless remain an important means of interfacing with other cataloging standards bodies (such as PCC, MARC Advisory Committee, etc.), and of evaluating proposals from other RDA constituencies.

Additional details on the governance changes can be found in the following reports from the ALA representative, Kathy Glennan: <http://alcts.ala.org/ccdablog/wp-content/uploads/2016/01/RDAGov-2016-01.pdf>

and the RSC Chair, Gordon Dunsire:
<http://www.gordondunsire.com/pubs/pres/RDAForum1601.pptx>

Dunsire also gave another presentation on Data capture and storage in RDA:
<http://www.gordondunsire.com/pubs/pres/RDADDataCap.pptx>

2016 Proposal cycle:

There are not currently any new CC:DA proposals of rare materials interest under consideration by CC:DA for the upcoming proposal cycle (to be considered by the RSC in Frankfurt, November 2016), but as proposals arise from CC:DA or other constituencies between now and June, those with potential rare materials implications will be brought to DCRM-L for discussion.

Other future work:

MARC proposal for 510 field:

This proposal seeks to add subfields \$2, \$0, and \$5 to MARC Bibliographic 510. \$0 to indicate an identifier, \$2 for the source of the citation form (and to establish a source code SCF), and \$5 for institutional code in the case of copy-specific references.

Though this was begun in conjunction with the rejected RDA proposal, we are planning to follow through with this MARC proposal. Please contact me (matthew.haugen@columbia.edu) if you are interested in helping author this proposal.

Appendix D: Report on OCLC and Rare Materials Survey

Copy Specific Information in WorldCat Survey Report, 2015

RBMS Bibliographic Standards Committee ALA

Midwinter 2016 – Boston, Massachusetts

Saturday, January 9, 2016, 8:30-11:30am

Westin Copley Plaza - Staffordshire

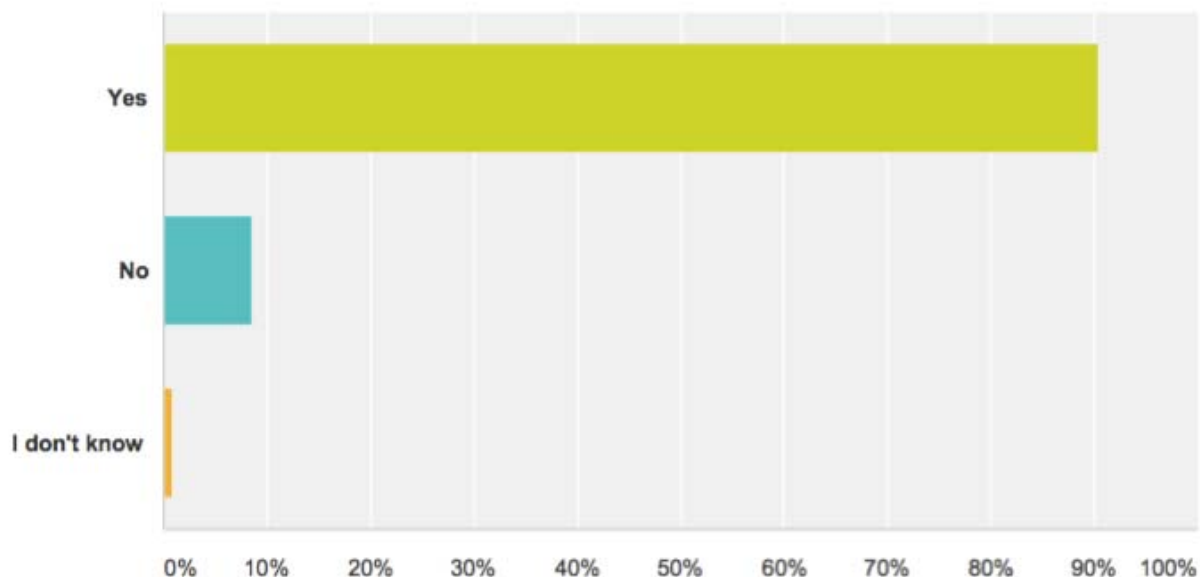
SUMMARY

On behalf of the RBMS Bibliographic Standards Committee, Allison Rich (Brown University), Asheleigh Folsom (Georgetown University), and Audrey Pearson (Yale University) explored ways to help OCLC understand the need to share local and copy-specific information in WorldCat. We created a brief survey so we can provide feedback to OCLC on this topic with the help of the rare materials community. The survey was sent to various rare materials related listservs including DCRM-L, EXLIBRIS-L, SHARP-L, and AUTO-CAT in mid-October 2015. The survey was aimed towards rare materials librarians, but was not limited as such. Anyone in the rare materials community had the opportunity to respond, including vendors, booksellers, publishers, etc. However, the survey was anonymous and we did not collect any demographic or personal information from respondents. The first 8 questions were required while questions 9 and 10 were for further comments or suggestions. The survey officially closed on Friday, December 4, 2015 and received 220 responses to the required questions as outlined below.

MULTIPLE CHOICE QUESTIONS

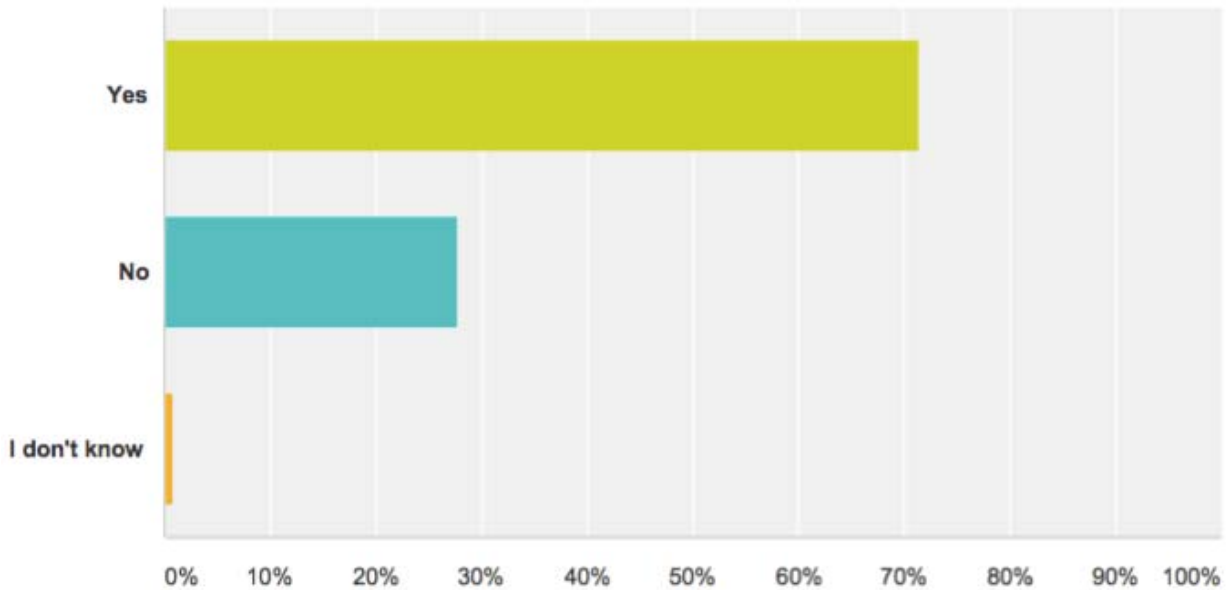
Question 1: Do you create copy specific information for materials at your institution?

Answer: 90.45% of respondents said that they do create copy specific information



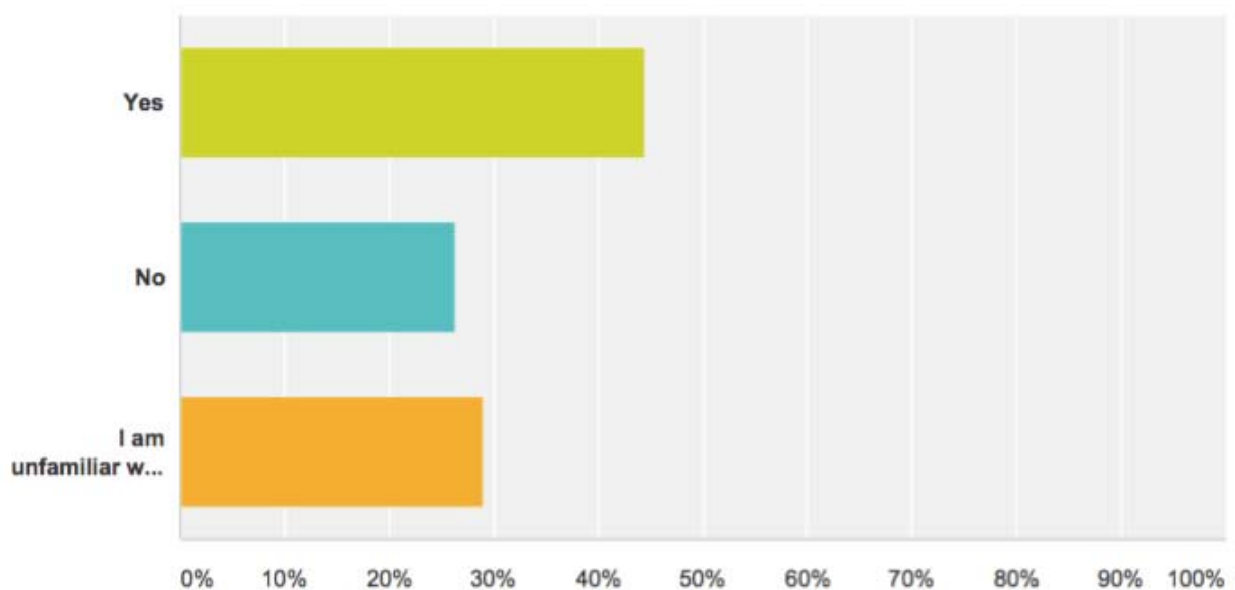
Question 2: Do you search for copy specific information for materials at other institutions?

Answer: 71.36% of respondents said they do search for copy specific information, while 27.73% said that they do not.



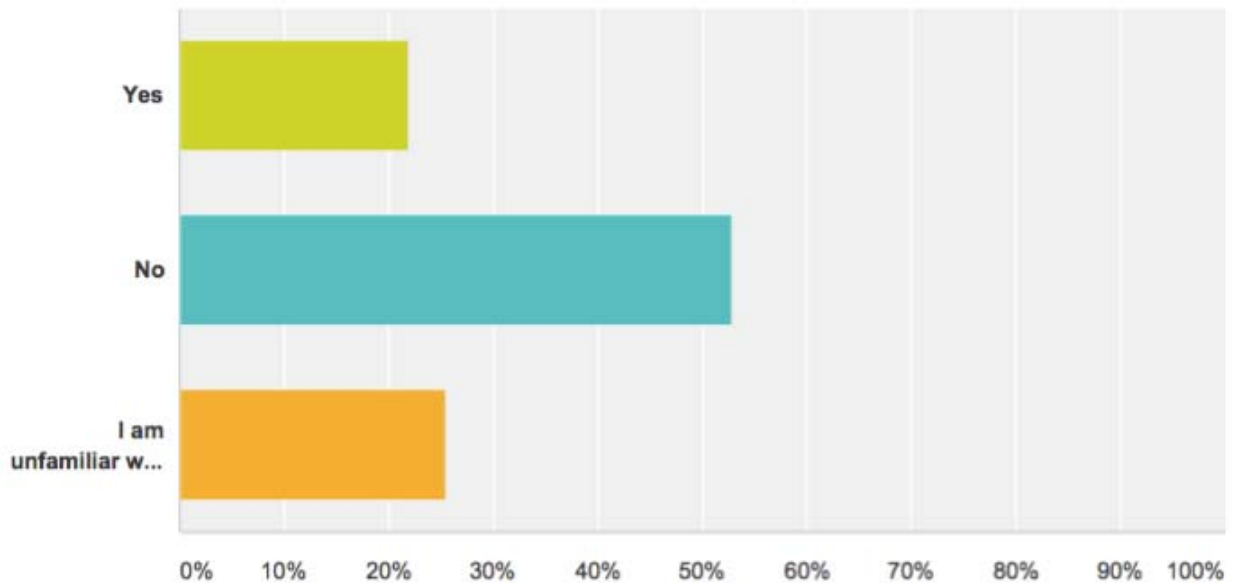
Question 3: Do you use or have you used Institutional Records (IRs) in OCLC?

Answer: 44.55% of respondents said they do/have used IRs in OCLC, while 26.36% said they do not and 29.09% said they are unfamiliar with IRs.



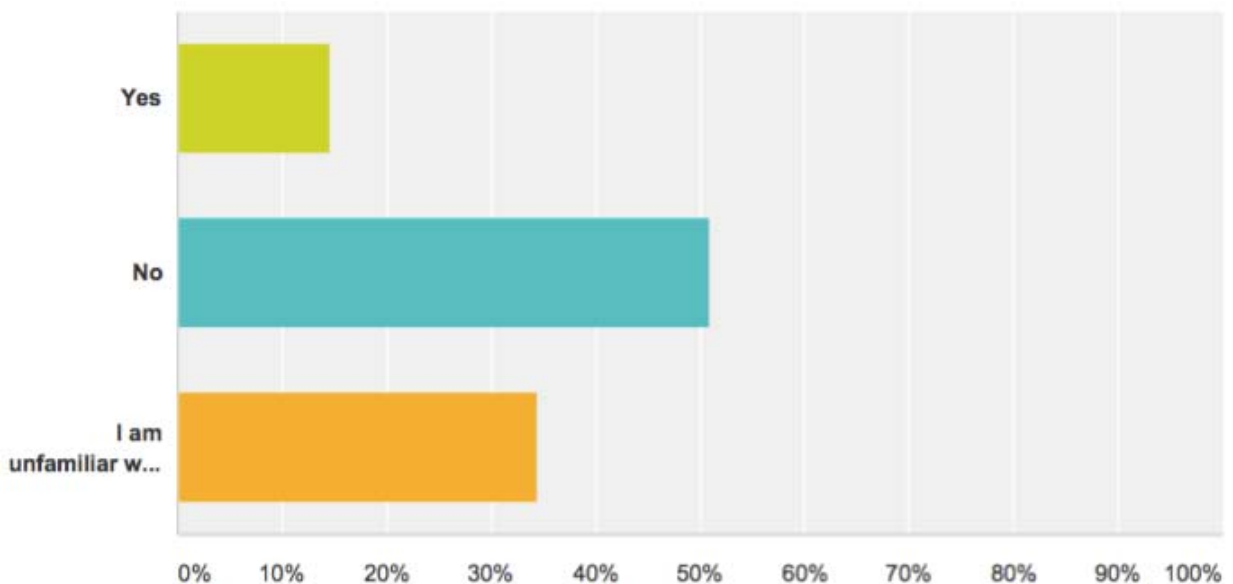
Question 4: Do you create or have you created Institutional Records (IRs) for your institution in OCLC?

Answer: 21.82% said they do create/have created IRs in OCLC, while 52.73% have not and 25.45% are unfamiliar with IRs in OCLC.



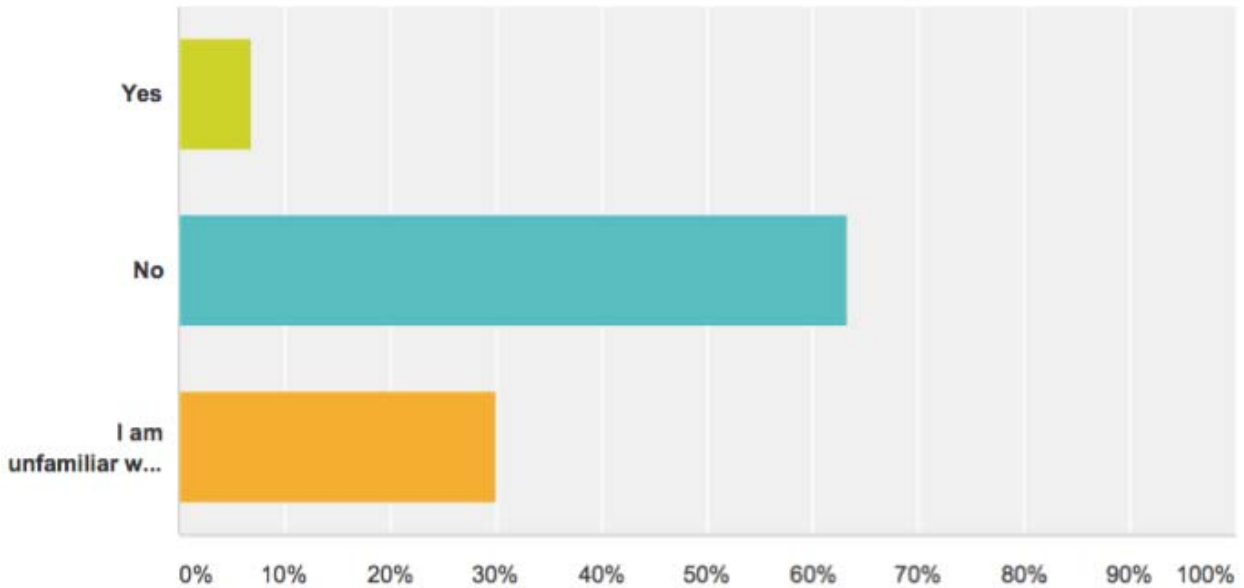
Question 5: Do you use or have you used a Local Bibliographic Data (LBD) resource in WorldCat Local or WorldCat Discovery?

Answer: 14.55% of respondents said that they do use/have used LBD in WorldCat, 50.91% said that they do not use LBD and 34.55% said they were unfamiliar with LBD.



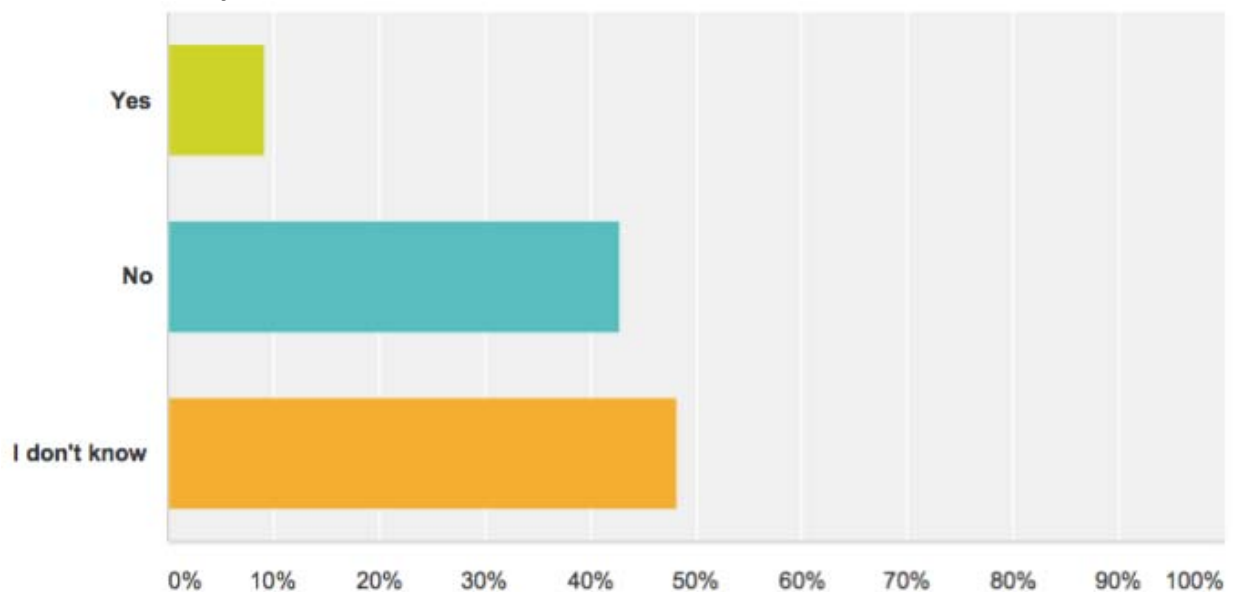
Question 6: Do you create or have you created a Local Bibliographic Data (LBD) resource in WorldShare Record Manager?

Answer: 6.82% of respondents said they do create/have created LBD in WorldCat, while 63.18% have not and 30% are not familiar with LBD.



Question 7: Have you deleted or are you planning to delete your Institutional Records (IR) from WorldCat without migrating to a Local Bibliographic Data (LBD) resource?

Answer: 9.09% of respondents said that they do delete/have deleted IRs in WorldCat without migrating to a LBD resource, while 42.73% have not and 48.18% said they do not know.



COMMENT BOX QUESTIONS

Question 8: Can you share any use cases when copy specific information in WorldCat was useful for you?

Answers: 220 respondents answered this question with various responses. 60 of the respondents said that copy specific information in WorldCat is not useful for them, while the remaining 160 respondents provided examples of how they use copy specific information in WorldCat. Many respondents noted that they use copy specific information when looking for binding and provenance notes to compare with the item in hand. They also use it to check collations. Others noted that they use copy specific information from Institutional Records in OCLC to verify that they are entering their information correctly. It is easier and more efficient to access this information from the IR directly in OCLC rather than searching a trusted institution's website or catalog.

Please see the Appendix for the responses.

Question 9: Do you have any suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat?

Answers: 111 respondents answered this question, of which 82 respondents provided suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat.

Please see the Appendix for the responses.

Question 10: Do you have any further comments/suggestions?

Answers: 99 respondents answered this question. Many respondents provided further clarification for their answers to the multiple choice questions from this survey. Others provided reasonable suggestions for making copy specific information more accessible and searchable in WorldCat.

Please see the Appendix for the responses.

APPENDIX
Answers to questions 8, 9, and 10
(Scroll to next page)

Q8 Can you share any use cases when copy specific information in WorldCat was useful for you?

Answered: 220 Skipped: 0

| # | Responses | Date |
|----|---|---------------------|
| 1 | No. | 12/7/2015 3:00 PM |
| 2 | I'm often looking for provenance, binding notes, etc to compare with items in hand. I also catalog a lot of ephemeral items, which bear comparison at a detailed level often best served by other copy specific information (to determine completeness). | 12/1/2015 4:56 PM |
| 3 | It's hard to narrow this down to specific use cases, but I do look at IRs all the time to determine if an aspect is item-specific, like bindings, author's signature, etc., or if it is present in other copies of the expression. | 11/30/2015 9:33 AM |
| 4 | I import records containing field 510, or copy that field. I copy notes that sometimes contain copy specific information. | 11/19/2015 4:35 AM |
| 5 | Descriptions of bindings by Jan Sobota. | 11/18/2015 9:54 AM |
| 6 | NA | 11/18/2015 4:56 AM |
| 7 | - When an issue is known to have multiple states, it could be useful to identify which state each institution has. - With donor notes or access points that could facilitate searching provenance (e.g., finding items formerly owned by the Dukes of Norfolk) | 11/17/2015 3:47 PM |
| 8 | No, but I can imagine many. | 11/17/2015 3:12 PM |
| 9 | In cataloging rare books, I would have found information about bindings useful. | 11/17/2015 1:53 PM |
| 10 | not applicable | 11/17/2015 12:52 PM |
| 11 | My own copy-specific information is useful. I do not find the copy information of other libraries to be of any use. It certainly doesn't belong in bibliographic master records. | 11/17/2015 9:20 AM |
| 12 | h | 11/16/2015 2:44 PM |
| 13 | None available | 11/16/2015 2:26 PM |
| 14 | No. | 11/16/2015 2:03 PM |
| 15 | Many times I use other institutions' copy specific information to verify that I am entering my information correctly. Having IRs in OCLC, versus having to go out to a trusted institution's site to look at these notes, is a huge time saver. | 11/16/2015 12:45 PM |
| 16 | Not at this time. | 11/16/2015 12:17 PM |
| 17 | Checking collations. | 11/16/2015 10:45 AM |
| 18 | It hasn't been useful before. | 11/16/2015 10:36 AM |
| 19 | Local data is really important for Rare Book cataloging as well as users identifying the provenance of resources (From the library of ...). It needs to be discoverable. As libraries continue to move onto the Web (e.g., with BIBFRAME, Linked Data, Semantic searching) it becomes even more important. | 11/16/2015 10:32 AM |
| 20 | We had a transfer of materials from another institution. When I was given the materials to catalog, I found OCLC records for all items from one of the offices. I was able to verify that the records were written for the item at hand because of the copy details. This saved me (and OCLC!) from the inadvertent creation of duplicate records | 11/16/2015 10:27 AM |
| 21 | I can't remember any specifics right now, but there have been many times when information in IR records was crucial to saving me research time. | 11/16/2015 10:12 AM |
| 22 | No, I have never found copy specific information to be helpful. Mainly it is annoying because it has to be deleted from the local copy of the record. | 11/16/2015 10:06 AM |
| 23 | have not used such information | 11/16/2015 9:36 AM |
| 24 | no | 11/16/2015 9:27 AM |
| 25 | no | 11/16/2015 9:13 AM |

| | | |
|----|--|---------------------|
| 26 | Afraid not. | 11/16/2015 7:07 AM |
| 27 | Occasionally we make use of local information that gives an indication of printing dates or variants when this appears in WorldCat. | 11/15/2015 10:04 PM |
| 28 | no | 11/15/2015 9:37 AM |
| 29 | No | 11/15/2015 8:19 AM |
| 30 | The can have important bibliographical citations or improved collations. Also, occasionally measurements show that large-paper copies exist. We've used ownership notes to trace provenance of collections that have been dispersed. | 11/14/2015 3:47 PM |
| 31 | Not specifically. | 11/14/2015 11:54 AM |
| 32 | no | 11/14/2015 10:29 AM |
| 33 | no | 11/14/2015 10:08 AM |
| 34 | As it seems to be inaccessible I search for it using other services | 11/14/2015 8:40 AM |
| 35 | Provenance research | 11/14/2015 6:04 AM |
| 36 | when it is thoroughly described | 11/14/2015 12:34 AM |
| 37 | No. | 11/13/2015 7:04 PM |
| 38 | Binding info | 11/13/2015 7:03 PM |
| 39 | No | 11/13/2015 12:29 PM |
| 40 | It's useful for researchers and librarians working with rare european collections missed or moved or dissipated | 11/13/2015 9:45 AM |
| 41 | not searched for in worldcat, searched at the institution itself (provenance records as an example) | 11/13/2015 8:55 AM |
| 42 | My institution is not cataloguing directly in WorldCat nowadays. Only send you our records. | 11/13/2015 5:10 AM |
| 43 | Verify binding types, bookplates, annotations for provenance -- it's a way to tell if the book is lacking plates, plate count -- helpful to both catalogers and researchers | 11/12/2015 9:06 PM |
| 44 | For *issue* specific info, for serials, I look at IRs all the time to see, for instance, if another library has earlier or later issues. Based on that info, I may be able to add beginning and/or ending dates to the serial record and/or confirm the title is still current or has ceased or has changed title. There are many titles in OCLC for which IRs have more info than the master record. | 11/12/2015 6:55 PM |
| 45 | Yes | 11/12/2015 5:04 PM |
| 46 | Search for books from certain collections or certain previous owners | 11/12/2015 2:12 PM |
| 47 | Provenance research (Antwerp monasteries) | 11/12/2015 10:50 AM |
| 48 | It could be useful in book census projects, .e.g. the current census project for copies of the first edition of Vesalius's 'De humani corporis fabrica', to ascertain the presence and frequency of annotations in copies of a work, details of their bindings, etc. It is useful when trying to trace items from a collection which has been dispersed among many libraries. | 11/12/2015 10:27 AM |
| 49 | no, but without IRs to those who now have access to them, our local ID numbers are unavailable | 11/12/2015 9:06 AM |
| 50 | Comparing copies of incunabula | 11/12/2015 7:28 AM |
| 51 | identification rare documents | 11/12/2015 4:59 AM |
| 52 | Especially for older books, it is important to be able to access copy specific information. Books can be incomplete, have inserted handwritten texts, or have bound different works together in one cover. The cover itself, often unique to the copy, might have particularities that are important to describe. Without access to this copy specific information, it becomes impossible for clients studying these books to find the copies that are of particular interest to their research. | 11/12/2015 4:59 AM |
| 53 | Copy specific information is useful in bookbinding or provenance research | 11/12/2015 4:13 AM |
| 54 | provenance research | 11/12/2015 4:12 AM |
| 55 | Copy specific information is useful when it is the only place where this is held. | 11/11/2015 4:12 PM |
| 56 | I have sometimes used it to find provenance, which is not easy to do in Worldcat but have occasionally found things | 11/11/2015 11:24 AM |
| 57 | No. | 11/11/2015 8:53 AM |

| | | |
|----|---|---------------------|
| 58 | As a cataloguer of special collection, I'm using and describing copy specific information almost daily... For example to describe unique covers, former owners, interesting notes etc. Which is appreciated and used by our customers and researchers | 11/11/2015 7:32 AM |
| 59 | No | 11/11/2015 5:39 AM |
| 60 | I assume by WorldCat you mean the database as viewed in the Connexion client, because the public interface of WorldCat on the web does not show IR or copy specific information. There are too many advantages to list. A few: IRs almost without exception carry more detail both at the manifestation and the item level, therefore they are more useful for cataloging purposes and for discovery; helpful in establishing the ideal copy and in determining whether ours is defective; useful in assessing rarity and making decisions about acquisition and/or deaccessioning of rare materials; useful for authority work; crucial for any research on books as objects, e.g., binding, ownership history, decoration, provenance, inscriptions, annotations, watermarks, etc. | 11/10/2015 4:05 PM |
| 61 | For our manuscripts master records, we put in minimal information. We put all our local notes in the Institutional Records. | 11/10/2015 2:42 PM |
| 62 | Copy specific information is essential to our patrons in comparing one institution's copy of a given work to other institutions' copies, e.g. if they're compiling a bibliography or a census of known copies of a particular work. These patrons won't know whether or not it's worth it to them to travel to our library unless they can see our copy-specific information for that work. If we could access IRs more readily, we would also use other institutions' copy-specific information to help determine whether our copy is a bibliographical variant or represents a different state or issue within the same edition. | 11/10/2015 1:59 PM |
| 63 | 1. I was having trouble establishing the identity of the owner of an 18th-century manuscript library catalogue who was identified on the title page simply as "Mr. d'Anthilly." I searched WorldCat for this name and found a book at the Clark Library which had recorded an ownership stencil bearing his full name (Charles-Antoine d'Anthilly). I knew it was the correct owner, because the same stenciling technique was used in our catalogue. I confirmed the match when I found the Clark book in the library catalogue itself. 2. I was recently trying to find books formerly owned by Jean Grolier in American libraries. By searching for Jean Grolier, any record that had him as an added entry came up (former owner). This would have been extremely tedious and less comprehensive if I had to guess which institutions might have Jean Grolier books and then check their individual catalogues. I was undertaking this search on behalf of a researcher and also because I was looking for examples of how others had recorded binding details. | 11/10/2015 11:36 AM |
| 64 | For an article three years ago I was searching for a specific state of an old map; I found several hits on this map but couldn't detect the right state in Worldcat. Instead I had to link to the local catalogue of more specific information (and found it there). So copy specific information in WC would be very useful at the time ... | 11/10/2015 10:19 AM |
| 65 | No | 11/10/2015 9:49 AM |
| 66 | I usually use COPAC for this matter, and it is useful to see e.g. ownership of materials | 11/10/2015 8:07 AM |
| 67 | No | 11/10/2015 7:59 AM |
| 68 | adds to local knowledge | 11/10/2015 7:39 AM |
| 69 | I don't use Worlcat for the cataloguing | 11/10/2015 7:23 AM |
| 70 | Provenance, clear basic printing information. | 11/10/2015 7:07 AM |
| 71 | Provenance, annotations, binding, (hand) coloring, collation (if lacking in bibliographical record), any copy specific variants (i.e.large paper, numbered/signed copies, trade binding etc.) | 11/10/2015 5:47 AM |
| 72 | OCLC 781117987 tag 581 8: At foot of imprint: According to the copy printed at Edinburgh by Andro Hart, in the yeare 1610. | 11/10/2015 5:46 AM |
| 73 | No | 11/10/2015 5:21 AM |
| 74 | I'm interested in rare books or maps records stating that (and how) the copy is hand coloured or uncoloured (if both is possible) to find out what is/was common then. | 11/10/2015 4:38 AM |
| 75 | The inverse. I published a paper on the early publication history of Tolkien's Lord of the Rings. It was essential that I consult copies of different printings of the first edition, in order to determine whether they were printed in England, or in the States. At that time, tools such as WorldCat were no use. | 11/10/2015 4:17 AM |
| 76 | No. | 11/10/2015 4:16 AM |
| 77 | Yes, in looking for known copies of a book inscribed by a historic fellow of the institution where I work | 11/10/2015 4:06 AM |
| 78 | Provenance research | 11/10/2015 3:58 AM |
| 79 | Did not find enough copy-specific information even in Firstsearch | 11/10/2015 3:55 AM |

| | | |
|-----|---|---------------------|
| 80 | useful for provenance research and for research into book bindings | 11/10/2015 3:36 AM |
| 81 | For our rare book and special collections, and for materials that are gifts or purchased with special funding, being able to have LBD records has been a great improvement. We use WorldCat Local as our discovery layer and being able to search and display local information of various types is critical for us. | 11/9/2015 2:49 PM |
| 82 | to assist in decisions as to whether or not your title is identical or slightly different especially in cases of rare books | 11/6/2015 12:26 PM |
| 83 | -- Helping researchers find 16th- and 17th-century books with copy-specific characteristics (e.g. former owner, binding style, printers' waste, early annotations) -- Figuring out if what seems like an anomaly in our copy is actually a variant found in other libraries' copies (e.g. number and location of plates) -- Determining which library to approach for an exhibition loan (e.g. who has copies with early hand-coloring?) -- Researching possible acquisitions: what's special about copies in other special collections libraries compared to the copy we're considering? Do other libraries generally have complete copies, or is it normal for surviving copies to be partial? -- Finding extra-illustrated copies of books | 11/4/2015 2:39 PM |
| 84 | Copy specific information is critical for identifying digital objects when more than one digital object is associated with a single bibliographic record | 11/4/2015 10:29 AM |
| 85 | As a rare book librarian, I depend on copy specific information and use it daily. I tend to use our IR because it has better local search capability. | 11/2/2015 5:42 PM |
| 86 | We do not customarily consult other institution's local bibliographic data, but being able to see/search our OWN local bibliographic data is crucial. The data that makes our holdings unique is the entire reason we collection that material. If our local data isn't available, we might as well stop collecting. | 11/2/2015 4:05 PM |
| 87 | Our goal is to provide the highest quality bibliographic records for our patrons. To that end, the work done by institutions like the American Antiquarian Society, Library Company of Philadelphia, and Folger Shakespeare Library provide us with excellent records to copy-catalog with. | 10/30/2015 9:47 AM |
| 88 | Occasionally, for example, to verify pagination when I wasn't sure if my copy was incomplete or not. | 10/29/2015 4:42 PM |
| 89 | We use WorldCat as our primary catalog, and we need to be able to both search and uncover copy-specific information for ourselves, and to teach students, so they can access our unique materials rather than be directed to a mass reprint in the circulating shelves or through ILL. We also use copy-specific information in collection building, to compare who in the region has a similar edition and if there is value in us acquiring something that may have some regional redundancy. | 10/29/2015 11:57 AM |
| 90 | 1. Binding descriptions are very helpful for determining if mid 19th century cloth bindings are publisher's bindings or other. 2. If author has signed/stamped all copies | 10/28/2015 5:33 PM |
| 91 | Locating records of specific author; documenting/ verifying location of signed editions; comparing editions with similar publication dates; verifying publication dates of early mss.; measurements; values; comparison of binding/publishers names. | 10/28/2015 4:10 PM |
| 92 | In distinguishing our copy from another copy. | 10/28/2015 11:59 AM |
| 93 | no | 10/28/2015 11:37 AM |
| 94 | I could see it being useful in certain cases (inscriptions of notable individuals, interesting provenance, etc), but since it usually is not recommended to record institutional and copy-specific information in WorldCat, I don't really expect to find it in WC, and don't usually even try to look for it. | 10/28/2015 10:43 AM |
| 95 | Often helps identify that we have a variant issue --something significant for rare book users but not a large enough difference to warrant a new OCLC master. I was also able to track down the provenance of a book printed in only 12 copies through a copy specific provenance note in the LC copy. | 10/27/2015 4:18 PM |
| 96 | In answering reference questions about provenance and annotations. Can you tell me where there are books by Alexander Pope that he owned and/or annotated? Questions of this sort are asked with some regularity. | 10/27/2015 10:51 AM |
| 97 | Since WorldCat serves as our discovery layer, our previous cataloger placed item specific information, only to see it altered. Our users would prefer to be able to see and use copy specific information. | 10/27/2015 10:21 AM |
| 98 | Many museums and museum-like historical agencies have special collections, particularly in government. Copy-specific information tends to be used to determine certain intrinsically value characteristics of a particular book or ephemera item that are sought out for exhibition in a museum gallery or for research. An example of copy-specific information would be an inscription by (or to) a particular owner of a volume, and notes written within the volume. | 10/27/2015 9:52 AM |
| 99 | No I cannot. | 10/27/2015 9:34 AM |
| 100 | No | 10/27/2015 9:19 AM |
| 101 | We specialize in fine press books, which often vary in terms of binding and other copy-specific aspects of the item. We often need the copy-specific information to determine if another institution's holding is identical to ours. | 10/26/2015 4:10 PM |

| | | |
|-----|--|---------------------|
| 102 | No. | 10/26/2015 4:02 PM |
| 103 | particular provenance information is useful; as well as time period of bindings | 10/26/2015 3:21 PM |
| 104 | Manuscript waste, provenance | 10/26/2015 3:01 PM |
| 105 | Occasionally something sneaks by the master record (usually by incorrect coding) that enables me to determine whether a feature in my item is copy specific or not. | 10/26/2015 1:04 PM |
| 106 | Looking for institutions that held our mission journal that we once published | 10/26/2015 12:44 PM |
| 107 | Not off the top of my head.... | 10/26/2015 11:26 AM |
| 108 | no | 10/26/2015 8:09 AM |
| 109 | I tend not to use WorldCat for this function as I find it too fiddly and difficult to find information. I use it all the time on ESTC and COPAC however. | 10/26/2015 7:08 AM |
| 110 | Looking for specific editions | 10/25/2015 5:16 PM |
| 111 | Often, when researching editions and reprints of older books, such as Samuel Hearne's Journey. | 10/24/2015 8:37 PM |
| 112 | no | 10/24/2015 1:53 PM |
| 113 | Yes. It let me locate copies of an old rare book that I didn't otherwise know about. It let me locate information about provenance (via a full-text phrase search) that I would not otherwise easily have been able to access. | 10/23/2015 3:19 PM |
| 114 | I find binding information particularly helpful when comparing how a book was used/valued. | 10/23/2015 3:10 PM |
| 115 | Cataloging rare items has been most useful, especially in finding certain oddities with the book in hand that otherwise may have been missed. | 10/23/2015 2:51 PM |
| 116 | I can tell you when it was not. I have discovered that microfilm of the Pittsburgh Courier is consistently misidentified by librarians. It took months, but I confirmed that almost none of the local-edition microfilm listed in OCLC holdings is actually film of those local editions. | 10/23/2015 2:41 PM |
| 117 | We are a small institution and being able to see specifically what is available elsewhere is extremely helpful, both with cataloging our own copy and with providing the best assistance to our patrons. | 10/23/2015 2:08 PM |
| 118 | No - my library has always added copy-specific information only in our local catalog. | 10/23/2015 1:59 PM |
| 119 | It is useful when I'm trying to compare the ways in which certain bibliographical qualities are described. | 10/23/2015 1:41 PM |
| 120 | When working with researchers who needed or, more importantly in some ways learned that they needed once the existence was known, a specific copy. | 10/23/2015 1:26 PM |
| 121 | I do research on 16th century books. On several occasions I have wasted part of a trip to examine a book that turned out to be damaged, or copy-cataloged onto a description that did not fit that library's actual holdings, or otherwise inaccurately identified. | 10/23/2015 1:23 PM |
| 122 | Copy specific information is crucial in my work. This morning I was using a digitised image of a copy held in the BL that has had parts added; it is listed in stc as an imperfect copy in the particular gatherings and pages, but it is impossible to tell, without copy specific info, whether the pages were tipped in or what; and in another case this week, there is clearly an imposition problem in one digitized copy I was looking at, but no mention of that in the cataloguing. | 10/23/2015 1:03 PM |
| 123 | Find a copy owned by a certain person | 10/23/2015 11:26 AM |
| 124 | In the case of misbound leaves, to determine if other copies also have those same leaves misbound. In the case of a blank leaf at the end, to determine if other copies also contain that blank leaf. | 10/23/2015 9:36 AM |
| 125 | I generally have used IRs to look for variations between copies or issues, but not for copy-specific information specifically. | 10/22/2015 3:41 PM |
| 126 | I look at other institution records all the time because they tend to be more complete and detailed, especially for the type of rare materials I am cataloging. | 10/22/2015 9:07 AM |
| 127 | No, but I am not a researcher | 10/22/2015 9:03 AM |
| 128 | Frequently with rare book cataloging, I find an IR that includes details such as a signature statement, or the presence of a printer's device, that helps me verify the record as a match for my edition in hand. Also, I appreciate the IR's on OCLC that enhance the standard subject headings by adding form/genre entries. Occasionally, I may find a usable classification number on an IR when a call number for my desire scheme is lacking from the master record. | 10/21/2015 4:29 PM |
| 129 | We often look to compare our copy to those at other organizations in an effort to determine whether or not they are the same. | 10/21/2015 2:01 PM |

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| 130 | No, sorry. | 10/20/2015 6:46 PM |
| 131 | IRs via Connexion have been very useful for special collections cataloging. We do not use WorldCat Local or WorldCat Discovery so we do not have access to LBD on WorldCat. | 10/20/2015 4:29 PM |
| 132 | It's helpful to see copy-specific information from other institutions when one is checking to see if an anomaly in our own copy is also found in other copies. We also know of researchers interested in particular previous owners, or in particular binding styles, who want to find this information in WorldCat. | 10/20/2015 3:08 PM |
| 133 | No | 10/20/2015 2:56 PM |
| 134 | Pretty much constantly. | 10/20/2015 12:38 PM |
| 135 | Identifying specific issues | 10/20/2015 12:25 PM |
| 136 | I'm afraid not. More often than not, it manifests as a burden, taking the form of copy-specific notes not removed from OCLC master records when imported as part of a batch process. | 10/20/2015 12:21 PM |
| 137 | No | 10/20/2015 12:16 PM |
| 138 | I have generally not found copy specific information useful in WorldCat; maybe once or twice in my whole career has it been helpful, and when I need to check copy specific information I always go to the local catalog of the institution in question. I never assume that WorldCat gives me the whole story on any one item. | 10/20/2015 12:14 PM |
| 139 | Printing variants that may or may not be copy specific to compare with my institution's copy. Provenance info. | 10/20/2015 12:12 PM |
| 140 | No | 10/20/2015 11:25 AM |
| 141 | I find the LBD option potentially useful for cases when we have special markings or bindings for a particular item, although it's currently not part of our regular workflow. We use Connexion Client heavily, which doesn't have the LBD option, so my supervisor will not approve using the Record Manager to manage LBD. | 10/20/2015 10:30 AM |
| 142 | Sometimes it's not obvious that there are multiple volumes or parts to an item and one institution will catalog it with a single volume and then someone else will catalog it with all parts. Also, multiple titles can get bound together and that will increase pagination counts. | 10/20/2015 10:20 AM |
| 143 | N/A | 10/20/2015 10:16 AM |
| 144 | n/a | 10/20/2015 10:16 AM |
| 145 | Collection development decisions can be affected by the presence in other institutions of - for example - similar or identical association copies, similar or identical jacket or binding edition variants, incompleteness or irregularities in illustrations, maps etc | 10/20/2015 10:08 AM |
| 146 | Copy-specific information is absolutely essential when dealing with archival collections. To try to describe multiple collections (each named properly according to professional conventions) in the same record is misleading and does a disservice to the profession. | 10/20/2015 9:59 AM |
| 147 | Yes - I use copy specific information regularly in my daily work. | 10/20/2015 9:47 AM |
| 148 | No. | 10/20/2015 9:36 AM |
| 149 | variants in foliation/pagination; variants in signatures | 10/20/2015 9:19 AM |
| 150 | As a special collections cataloger, nearly every item I catalog is unique. These are the materials that separate my library from every other library in the world. This uniqueness must be captured and made searchable. Otherwise, we may as well be Google. | 10/20/2015 9:10 AM |
| 151 | Unfortunately, no. 90% of the time when searching for other copies of rare books (esp. early printed books), I am only interested in copy-specific information. I find this sort of data nearly impossible to search for on WorldCat and use the specialized early printed book databases instead. When I have tried to use WorldCat (unless I cannot figure out the best way to search) the individual records seem so confused and muddled together that records are retrieved having 'inscription X' but in reality, that piece of data was just copied/conflated from some other record and has nothing to do with that actual copy. The vague edition/copy divisions on WorldCat make searching for individual copies (for me) very difficult. | 10/20/2015 9:06 AM |
| 152 | Copy specific info is the most valuable info for rare materials cataloging, but it's practically impossible to find and use in OCLC. | 10/20/2015 9:00 AM |
| 153 | It helped identify the provenance of an early English book. | 10/20/2015 8:59 AM |
| 154 | Ascertaining if "signed" copies were common; determining "original" bindings; Locating bindings by specific binders; Seeking items from particular former owners (provenance): etc. | 10/20/2015 8:54 AM |
| 155 | no | 10/20/2015 8:50 AM |

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| 156 | Finding examples of a particular bookplate in other libraries that I had been unable to identify, but that the other libraries had been able to identify. Tracing copies of books belonging to a particular person or institution that our researchers are interested in. Etc. | 10/20/2015 8:43 AM |
| 157 | Discovering local provenance information or other inscriptions to help date an item or identify attribution. Looking for fuller records when the Institutional Record contains more information or is more complete than the master record. Looking for information justifying or expanding upon supplied elements in the catalog record. | 10/20/2015 8:37 AM |
| 158 | No. I don't look for copy specific information for books in other institutions. As a cataloger, I'm more interested in matching up bibliographic descriptions. I want to include searchable copy specific information somewhere (bib record? LBD?) for our researchers and for our own record-keeping. | 10/20/2015 8:35 AM |
| 159 | For identifying usages and forms of headings when establishing name authority headings -- master records don't provide the most information. | 10/20/2015 8:33 AM |
| 160 | Confirmed local copy information. | 10/20/2015 8:30 AM |
| 161 | Yes, for research I was doing on the sale catalogues of a book collector's collection--I needed to know which ones had annotated lots | 10/20/2015 8:21 AM |
| 162 | no | 10/20/2015 8:06 AM |
| 163 | No. | 10/20/2015 8:06 AM |
| 164 | When I have an OCLC bib record without an LC call number (or Dewey) and need to create a call number from scratch for my institution's copy, it can be helpful to see what other institutions (if any) have done. | 10/20/2015 8:04 AM |
| 165 | States for rare materials Serials details | 10/20/2015 8:04 AM |
| 166 | Not at this time | 10/20/2015 7:55 AM |
| 167 | No, but I view them as needed security/proof of ownership identification | 10/20/2015 6:18 AM |
| 168 | When attempting to distinguish between complete and incomplete copies of an edition, surveying 19th century variant cloth bindings, etc. | 10/20/2015 4:38 AM |
| 169 | For finding numbered copies, or personal copies with annotations, or specific bindings. | 10/20/2015 3:47 AM |
| 170 | ESSENTIAL component when using RBMS "Transfer Guidelines..."[materials from general collections to special collections] - please consult Guidelines. | 10/20/2015 2:22 AM |
| 171 | The individual records from John Carter Brown regarding publications from Peru. | 10/19/2015 11:27 PM |
| 172 | Alwaysvisuseful | 10/19/2015 11:18 PM |
| 173 | There are plenty of times when I need clarification on an aspect of the bib record that can't be determined from the master record. When errors (or assumed errors) creep in, it's important to be able to check other copies to make sure my information matches. | 10/19/2015 10:49 PM |
| 174 | On numerous occasions, copy-specific information has alerted me to copies that should receive intensive bibliographical scrutiny or that had significant early annotations or a significant provenance. | 10/19/2015 10:47 PM |
| 175 | No | 10/19/2015 10:33 PM |
| 176 | To verify bibliographic information. | 10/19/2015 10:27 PM |
| 177 | To check copies with and those without errata sheets. | 10/19/2015 7:47 PM |
| 178 | Although usually not possible except in cases of "improper" inclusion on master bibliographic records, access to former owners of specific copies through a global WorldCat search would frequently be of immediate value to multiple users. | 10/19/2015 6:30 PM |
| 179 | MANY! Helping to distinguish when a variation (plates, TP features, binding, etc) is a copy-specific or issue/edition- general feature. Details of copy often help distinguish between records that could be for the same bib item but aren't, due to the often-low level of cataloging in many master records. | 10/19/2015 5:23 PM |
| 180 | When cataloging pre-1700 books which can vary significantly in terms of signatures, pagination, etc. It helps to figure out whether you have a documented variant in hand. | 10/19/2015 4:43 PM |
| 181 | Not really copy specific, but local records retained as IRs sometimes bring out bibliographic details that differ from the OCLC record to which they are attached. I have sought these out in the past for pre-1700 books. Sometimes of course a comparison of "master" records is instructive, since various records for rare materials are retained if they don't get merged or overwritten. | 10/19/2015 4:42 PM |

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| 182 | A specific example would be short stories published in Harper's New Monthly Magazine, that have been cataloged with the short story title as the main entry. The only place the name of the magazine (and volume and issue number) appears is in the 500 note, as in, "Contained in: Harper's New Monthly Magazine, v. 490 (Mar. 1891)." | 10/19/2015 4:38 PM |
| 183 | physical description details additional access point not present in master records | 10/19/2015 4:36 PM |
| 184 | Sometimes it is nice to see how other institutions construct copy specific information in notes. | 10/19/2015 3:53 PM |
| 185 | Provenance, binding information, foliation, | 10/19/2015 3:41 PM |
| 186 | I once had another library contact mine as we each had one volume of a two volume set. We had a copy-specific note in a 500 with \$5 about a fore-edge painting; their volume also had a similar fore-edge painting. I have also used IRs or looked at holding library catalogs when the master record(s) in OCLC were an ambiguous match to the one I had in hand. | 10/19/2015 3:40 PM |
| 187 | In the master record environment necessary to use WorldCat, it is often difficult to determine if the OCLC record in question is the right issue for your item. Additionally, the rules sometimes call for multiple issues/states to be cataloged on the same record. In both these cases, local information is necessary to provide the proper access to materials. | 10/19/2015 3:38 PM |
| 188 | Copy-specific notes can be very useful for dating materials (e.g. an undated publication for which a cataloger has provided a suggested publication date based on a former owner's dated inscription). | 10/19/2015 3:35 PM |
| 189 | When the master record on OCLC does not have a detail such as the signature statement, binding information, the fully transcribed imprint, or other rare book cataloging type of information, and that information could help me to identify whether the book I am cataloging warrants an original or whether I can use that master record. (I also use such information to be lazy and copy-catalog, to be perfectly honest.) Before IRs existed I'd go to the other library's catalog and look there, but sometimes those catalogs are behind firewalls. | 10/19/2015 3:35 PM |
| 190 | Specific descriptive data (i.e. binding) | 10/19/2015 3:34 PM |
| 191 | When bib records for different manifestations (publisher(s), publication date, pagination/volumation, etc.) for pre-1900 resources have been combined in the OCLC master record. We are looking to match pre-1900 copies to existing manifestations in OCLC. The institutional records attached to a master are often the only place where we find cataloging copy. | 10/19/2015 3:34 PM |
| 192 | 500 Non contemporary full brown calf; signed with ink stamp inside front flyleaf "Bound by W. Pratt" ...#5 E8W 655 Signed bindings (Binding) #2 rbbin #5 E8W | 10/19/2015 3:32 PM |
| 193 | I recall I found a record in another library's catalog that helped me catalog what I had in hand. | 10/19/2015 3:32 PM |
| 194 | No opinion. | 10/19/2015 3:24 PM |
| 195 | An owner's inscription which gave a purchase date provided a useful upper limit to the publication date of an undated incunable. This information was in a 500 note with \$5 NUC symbol. | 10/19/2015 3:23 PM |
| 196 | Dates inscribed in specific copies have helped me with assigning dates | 10/19/2015 2:35 PM |
| 197 | no | 10/19/2015 2:16 PM |
| 198 | No, I cannot. | 10/19/2015 1:36 PM |
| 199 | For older materials, invaluable to confirm extent of item, cover info, date, name on signature. Especially to assess what's a feature of the publication as opposed to truly missing. | 10/19/2015 11:41 AM |
| 200 | N/a. | 10/19/2015 10:47 AM |
| 201 | In cataloging rare books, whenever questions arise about editions, I consult copy-specific information in the form of IR's to ascertain the nature of any variations. | 10/19/2015 10:18 AM |
| 202 | not at this time | 10/19/2015 9:09 AM |
| 203 | No. | 10/19/2015 8:45 AM |
| 204 | Nope. | 10/19/2015 7:34 AM |
| 205 | No | 10/19/2015 6:41 AM |
| 206 | no | 10/16/2015 5:44 PM |
| 207 | I use IRs quite often for compare while cataloging Chinese rare books. I strongly hope those Chinese rare book project IRs could be kept in OCLC. | 10/16/2015 5:30 PM |
| 208 | For Rare Book cataloging | 10/16/2015 5:20 PM |

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| 209 | Often IRs have more detailed cataloging than Master Records. This can be helpful in distinguishing states, saving a huge amount of time, verifying details, etc. | 10/16/2015 4:29 PM |
| 210 | The cases of when I avail myself of IRs are many. But, the two main cases are when the master record does not contain enough information for me to decide with certainty whether the item in hand is a good match. Often the IRs associated with that master record will contain more conclusion information. Additionally I use IRs to crib from, when I'm updating a master record. It can save a lot of keystrokes. | 10/16/2015 4:06 PM |
| 211 | No | 10/16/2015 3:43 PM |
| 212 | No, but I expect it has been useful to our researchers! | 10/16/2015 3:40 PM |
| 213 | Some older material were released in various versions. The copy specific material allows me to identify whether my version is unique or one of many. | 10/16/2015 3:39 PM |
| 214 | I was trying to confirm a publication date for a specific edition of a book that had many editions over about 20 years. In Connexion, there were dozens of records but WorldCat lumped them into just a handful so it was useless to me. I needed to see the full pagination, binding notes and other fine details to try to match my item in hand. | 10/16/2015 3:36 PM |
| 215 | I can't recall anything specific. | 10/16/2015 3:35 PM |
| 216 | Mostly for pre-1800: pagination irregularities, collation, missing pages, notes about inscriptions and signatures, etc. | 10/16/2015 3:33 PM |
| 217 | Institutional Records are often fuller than the master record with exact and full transcriptions in 245 and 260/4, collations and physical descriptions in 500, references in 510, rare book genre headings in 655, addition added entries in 7XX, and 752. There are also sometimes explanatory notes distinguishing editions and/or issues. | 10/16/2015 3:18 PM |
| 218 | We have many rare books and need to distinguish among different states of various issues. | 10/16/2015 3:10 PM |
| 219 | Binding and colophon info | 10/16/2015 3:09 PM |
| 220 | test | 10/9/2015 4:46 PM |

Q9 Do you have any suggestions for making copy specific information in bibliographic records more accessible and/or searchable in WorldCat?

Answered: 111 Skipped: 109

| # | Responses | Date |
|----|--|---------------------|
| 1 | Yes, it would be great if you could allow libraries to search and see the local data fields (as an aggregate, not library by library) especially for the rare book community where small differences in copies make a big difference. This would also make people less likely to create unique bibliographic records for small variations related to issues and states of an impression and/or edition. It could also be a place to park all those 7XX fields currently designated as local through the use of \$5 subfields. | 12/7/2015 3:00 PM |
| 2 | If specific fields for local data or fields tagged as local can display separately from other general notes - identifying the source library of the note, I think that would be incredibly helpful to users and other catalogers/librarians. I think doing this on the back and front end of OCLC would be ideal. | 11/30/2015 9:33 AM |
| 3 | No | 11/19/2015 4:35 AM |
| 4 | Not really; can't you kw: them? | 11/18/2015 9:54 AM |
| 5 | NA | 11/18/2015 4:56 AM |
| 6 | OCLC has to be interested. This area is critical for rare books cataloging. | 11/17/2015 3:12 PM |
| 7 | It would be very useful to see the copy specific information without going to a library's own catalog, if, for example, by clicking on an institution's name, we could see the local fields. | 11/17/2015 1:53 PM |
| 8 | Just keep it out of master bib records. | 11/17/2015 9:20 AM |
| 9 | No. | 11/16/2015 2:03 PM |
| 10 | Perhaps a special field or new indicator that would be visible to public view? | 11/16/2015 12:17 PM |
| 11 | Remove all restrictions for adding local data (i.e, \$5). | 11/16/2015 10:32 AM |
| 12 | making the display and searchability of copy specific features (e.g. 5xx notes with \$5s) a feature that you can "turn off/on" similar to GLIMR clustering | 11/16/2015 10:27 AM |
| 13 | Perhaps consider the possibility of using available fields in the holdings records, such as 561 (provenance) and 563 (binding). | 11/15/2015 10:04 PM |
| 14 | No, but I think they should be more accessible/searable | 11/15/2015 9:37 AM |
| 15 | no yet - see answer to 10. | 11/14/2015 10:29 AM |
| 16 | Provide specific search options for it | 11/14/2015 8:40 AM |
| 17 | accurate linking from publishing year to institution | 11/14/2015 12:34 AM |
| 18 | No | 11/13/2015 12:29 PM |
| 19 | In our system we are able to serch in local information in bibliographic records associated a items information, like donation and donors. former owners. ancient printers.... | 11/13/2015 5:10 AM |
| 20 | It would be convenient if in a world cat record maybe at the bottom, after the main bib-record, it could display IR specific data, with the Institution's name attached and named "Individual Holdings Notes" or something to that effect. As it is, it is sometimes difficult for users to keep clicking through the Institution's websites to find the data they're looking for. | 11/12/2015 9:06 PM |
| 21 | To make the data in IRs remain available to catalogers, urge OCLC to find a way to freeze IRs for perpetual access. Another way to keep the data might be to migrate non-duplicative fields to the master record with indication of associated library (\$5 [marc inst. symbol], e.g.). Gather such fields at end of the record so they don't disrupt the flow of the master record itself.) Or, gather all such fields into a searchable appendix to the master record. In short, find a way to keep the IR data easily at hand for catalogers. | 11/12/2015 6:55 PM |

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| 22 | Introduce search options for binding terms and / or provenance. We have done this on our OPAC at King's College London: http://library.kcl.ac.uk | 11/12/2015 10:27 AM |
| 23 | Needs to be clearer which institution copy specific info relates to - and would it be possible simply to search for books only that had copy specific info | 11/12/2015 7:28 AM |
| 24 | No | 11/12/2015 4:59 AM |
| 25 | I have no suggestions on how to do it, but that it has to be done is self-evident | 11/12/2015 4:13 AM |
| 26 | not yet | 11/12/2015 4:12 AM |
| 27 | The catalogue should offer three layers: 1. General bibliographic 2. Institution specific 3. Copy specific All information should be indexed. but what is shown depends upon the user (general or specialist) | 11/11/2015 4:12 PM |
| 28 | When libraries contribute records to WorldCat, I believe sometimes copy-specific information is stripped out. If that is the case. why? I would like to see provenance information(561) and binding descriptions (563) included in records. | 11/11/2015 11:24 AM |
| 29 | We do not catalog in Worldcat yet, but a transition is planned for 2016. | 11/11/2015 8:53 AM |
| 30 | - | 11/11/2015 7:32 AM |
| 31 | My institution (University Library Utrecht) does not catalogue directly in Worldshare Record Manager, but will do so from March 2016. So it is not yet possible to give proper answers to all questions. We will use Local Holding Records for our copy specific information. Provenance (former owner etc.) is considered very important and needs to be accessible and searchable. We are still trying to find out how this can be best realized. | 11/11/2015 5:39 AM |
| 32 | Currently information that does not appear in the master record (whether general or copy specific) is not available through the public web interface. Ideally the information now stored in IRs would continue to be available in the cataloging client and also available in the WorldCat web interface. Access points, even the copy-specific ones, would be fully indexed and searchable in the same way as non-copy-specific data on master records. Ideally a search could either include or exclude copy specific information in the search results, in the same way as in the Connexion client you can include or exclude IRs in the search results. | 11/10/2015 4:05 PM |
| 33 | No (assuming that if it were just a matter of adding the 852 field to the searchable fields, it would have been done already) | 11/10/2015 1:59 PM |
| 34 | - Add provenance fields - Add fields for annotated copies | 11/10/2015 10:19 AM |
| 35 | In the COPAC environment libraries usually use numeric subfields to identify the library/collection for which the content of the marc field applies to. | 11/10/2015 8:07 AM |
| 36 | I don't have any idea | 11/10/2015 7:23 AM |
| 37 | Don't suppress this information, or make it only available in advanced views. | 11/10/2015 7:07 AM |
| 38 | Always keep the information linked to the item/copy described. | 11/10/2015 5:47 AM |
| 39 | Specific search fields for copy information. | 11/10/2015 5:46 AM |
| 40 | No | 11/10/2015 5:21 AM |
| 41 | Add an annotations file to the holding for copy details. | 11/10/2015 4:38 AM |
| 42 | I find them baffling hard to find at the moment, so anything that makes it clear how to search them and where to find them in the records would be useful. | 11/10/2015 4:06 AM |
| 43 | Display and make searchable copy-specific notes. (With the shelfmark when multiple copies in a record). Index copy-specific names | 11/10/2015 3:55 AM |
| 44 | it should be easy to see each institutions LBD/copy specific info; everything should be searchable. | 11/6/2015 12:26 PM |
| 45 | I don't have suggestions for HOW to do it, but I can tell you that I want to be able to limit by local collection; sort easily by date (showing all copies and not having to click "view all editions" to reveal dates; to preserve my results list even when clicking backwards and forwards. | 11/2/2015 5:42 PM |
| 46 | All legal MARC fields should be indexed and searchable. If the fields are not searchable, what is the point of populating them? | 11/2/2015 4:05 PM |
| 47 | My only suggestion is to somehow make copy-specific notes appear with the "brief view" results in WorldCat. By this I mean the listings of "Libraries Near Your That Have This Item" could include copy-specific notes. This could be a feature of FirstSearch (or its replacement) and not necessarily of the public WorldCat, as I imagine the coding work to accomplish this, and the fact that some very long copy-specific notes exist, would make it impracticable. | 10/30/2015 9:47 AM |

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| 48 | I think there are probably tactics from both a display perspective and a searching tactics. For display, some way of using the \$5 to pull together a particular institutions' copy info in visually distinct part of the screen (and not have it display in the main record area), e.g. Library of Congress copy information: [whatever fields]; American Antiquarian Association copy information: [fields]]. Separately indexed would be nice, too, so that you could search only for 7xx w/ \$e former owner | 10/28/2015 5:33 PM |
| 49 | WorldCat should be able to access and display copy specific information. | 10/28/2015 11:59 AM |
| 50 | I know that IRs are an option, but it seems like these are not widely used by many institutions, and I am not sure how to search them in the public view of WorldCat, so they seem somewhat useless. I would have two suggestions -- make it possible to have both public and non-public IRs or fields in IRs, such that institutions could have control over what is visible and not; promote the use of IRs more widely -- unless a critical mass of institutions uses IRs, I don't see many more institutions adopting them | 10/28/2015 10:43 AM |
| 51 | If either the LBDs or LHRs were more robust (LBD for example does not support 561s or other dedicated MARC fields for copy-specific information) AND were discoverable in World Cat (perhaps in a toggle off/on situation | 10/27/2015 4:18 PM |
| 52 | Not yet, because the problem is one I'm only beginning to be able to address, within a larger federal government organization that has many stakeholders. | 10/27/2015 9:52 AM |
| 53 | Please do! | 10/26/2015 4:10 PM |
| 54 | No. | 10/26/2015 4:02 PM |
| 55 | no, but I think this would be useful, especially for security of materials | 10/26/2015 3:21 PM |
| 56 | Abandon the concept of the master record and allow institutions to attach their own records! RLIN worked pretty well for complicated cataloging. Since that will not happen, institutions should be allowed to attach fields with a \$5 and their symbol, and these fields should become part of the permanent record. Yes this will make for some long records, but it will make records usable. Perhaps one could make the display of such information optional. | 10/26/2015 1:04 PM |
| 57 | no | 10/26/2015 8:09 AM |
| 58 | I wish I did, but I'm only a measly literature professor and have no clue how any of this is achieved. I'm delighted you're taking an interest in it, though, and hope good comes of your work! My own interested is in tracking female owners of books, so it would be nice if gender could be a category tracked in relation to provenance, but I suppose that's a tall order. | 10/23/2015 3:19 PM |
| 59 | Having previous owners available in say a 700 field would be incredibly valuable when trying locate books from a personal library. | 10/23/2015 3:10 PM |
| 60 | As a former cataloguer and now a social historian I do a lot of research in obscure 20th century printed material. I also look for annotated copies of individual works. Much of that material--even of common titles--is in special collections. Having access to precise copy-specific data is critical for me as I allocate my very scarce research-support budget. It also saves me time in posting queries to libraries looking for the kind of data I used to put in our local catalogues. | 10/23/2015 2:41 PM |
| 61 | No | 10/23/2015 1:41 PM |
| 62 | Keep the best features of the 1stSearch interface and data. Allow scholars and librarians access to it even if it's not "pretty." Those who need it will take the time to learn to find it. | 10/23/2015 1:26 PM |
| 63 | DO WHATEVER THE FOLGER LIBRARY DOES. They have awesome cataloguing standards and great copy-specific info. Be sure to include not only issues in printed books but also things like marks of ownership/provenance, marginalia, etc. | 10/23/2015 1:03 PM |
| 64 | Yes! Keep the IRs in WorldCat. | 10/23/2015 9:36 AM |
| 65 | Perhaps some libraries would be willing to pay an extra fee for the service of accessing the trove of local copy-specific notes associated with a given bibliographic record. But I assume that OCLC has already considered this idea and dismissed it due to a lack of cost-effectiveness. | 10/21/2015 4:29 PM |
| 66 | LBD is not practical for institutions that do not use WorldCat Local or WorldCat Discovery. It would be great if OCLC would make this information accessible through regular WorldCat but this does not seem to be the plan. | 10/20/2015 4:29 PM |
| 67 | I'm not sure how to achieve it, but it is not good the way it is now. Our library is avoiding moving to WorldShare Record Manager in part because of the poor handling of copy-specific information. Ideally, there should be a master record with metadata that applies to all copies, and then a separate tab or screen to go to in order to see all the various copy-specific descriptions, clearly marked as to what institution each applies to. | 10/20/2015 3:08 PM |
| 68 | Unfortunately no | 10/20/2015 12:25 PM |

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|----|--|---------------------|
| 69 | I don't know that it is absolutely necessary, assuming that institutions are able to maintain a local catalog that does retain the copy specific information. Too much copy specific information in WorldCat could be cluttering and confusing; I can't think of a good way to display without that being the case. | 10/20/2015 12:14 PM |
| 70 | No | 10/20/2015 11:25 AM |
| 71 | Either add LBD functionality to Connexion Client so we can use it as part of our regular workflow, or upgrade Record Manager enough that it has all of the functionality of Connexion so that we can move our workflows there. | 10/20/2015 10:30 AM |
| 72 | I think that it is important to ensure that the various interfaces accurately reflect the presence of, and basic details about, multiple unique copies. | 10/20/2015 9:59 AM |
| 73 | Sorting them by institution would be helpful, so that the user doesn't have to read every single note. | 10/20/2015 9:47 AM |
| 74 | Make it visible? Make it searchable? Don't get rid of IRs? They weren't ideal for finding copy specific info, but they are a whole lot better than what OCLC now proposes. | 10/20/2015 9:00 AM |
| 75 | no idea. | 10/20/2015 8:54 AM |
| 76 | It seems that being a WMS customer increases the likelihood of copy specific information being more accessible. As someone who works in a WMS library, I have NO interest in worldcat services to non-WMS customers of OCLC. Worldcat already seems overburdened with the current services offered. | 10/20/2015 8:50 AM |
| 77 | Allow anyone to see any institution's Local Bibliographic Data, and allow that data to be searchable in an easy way through the normal Connexion/WorldCat searching protocols. | 10/20/2015 8:43 AM |
| 78 | Allow better, more granular searching in WorldCat. The OPAC's advanced search only has the following fields: Accession Number; Author; ISBN; ISSN; Journal Source; Keyword; Subject; Title. Many of those aren't applicable to rare materials, and one is left searching "Keyword" for any copy-specific information, which is unfortunately broad. | 10/20/2015 8:37 AM |
| 79 | I'm not sure what the options are. Isn't copy specific information in bib records still discouraged? | 10/20/2015 8:35 AM |
| 80 | Display the Added / Altered fields inline for all records - perhaps color coding variant. | 10/20/2015 8:30 AM |
| 81 | no | 10/20/2015 8:21 AM |
| 82 | When displaying the institution's name that has a copy, also display their call number and availability (whether checked out) in smaller print just below the bolded institution name. | 10/20/2015 8:04 AM |
| 83 | It's very difficult to locate copy specific information in WorldCat for me without going to the actual institutional catalog. Frequently there are too many records with the wrong information about editions, and the copy-specific information gets orphaned and put into the notes field without a way of knowing which copy it should be attached to. | 10/20/2015 3:47 AM |
| 84 | Include them as separate records. There is so much duplication now in WC that a few more records won't hurt. | 10/19/2015 11:27 PM |
| 85 | Not sure this would be possible in a master record situation, unless there were options to limit searches to certain fields, institutions, or other parameters | 10/19/2015 10:49 PM |
| 86 | No | 10/19/2015 10:33 PM |
| 87 | If only those LBD belonging to other cataloguing agencies were searchable. | 10/19/2015 7:47 PM |
| 88 | Although being able to search LBD information without being in a specific library's "catalog" would be great, it would at least improve accessibility of LBD would be displayable in the same way information from a library's LHRs as displayable in WorldCat--whether immediately when viewing a specific institution's holdings through WorldCat or by clickable link from the holdings information to "Display Local Bibliographic Data". What is overly cumbersome is to have to guess which holding institutions one needs to search via a local catalog in order to discover the existence of a local catalog. Currently, such a solution would presumably only improve visibility for holdings of WMS institutions who have access to LBD capability, not to users of other svsystems whose holdings data is not stored by OCLC. | 10/19/2015 6:30 PM |
| 89 | Restore IRs! (The features in LBRs are really useless to catalogers and researchers) Create an open-access union catalog version of US rare book catalogs, using linked data. (Why should OCLC control cataloging records created by US as their proprietary data?) | 10/19/2015 5:23 PM |
| 90 | I'm assuming they're searchable by keyword? If not, they should be. | 10/19/2015 4:43 PM |
| 91 | If IRs are not going to be retained by OCLC, then the next best thing would be to improve electronic links between holdings information and the actual records of the libraries that hold the material. | 10/19/2015 4:42 PM |
| 92 | At my institution there is a (rather backwards) way to limit keyword search to any MARC field, for the above example, I can search just the 500 or 590 fields for "contained in". This may already be possible on Worldcat, I haven't tried - but this method is usually enough for my needs as a cataloger, though time consuming (as I can't combine this kind of search with say, date of publication). Impractical for lay users but might be useful somehow.... | 10/19/2015 4:38 PM |

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| 93 | copy specific information should be visible for all user's of WorldCat, not just the user of the local institution and it should be easily accessible. | 10/19/2015 4:36 PM |
| 94 | I would like to encourage everyone to update the master record when the additional information is not really local -- I have found info in IRs and local catalogs that it would have been great to have added to the master. If the LBD is OCLC's way forward, it might be nice to be able to view that information, in a similar but easier way than current IR functionality. | 10/19/2015 3:40 PM |
| 95 | Not really. I don't use the public user interface of WorldCat to search much; I use the Connexion client. | 10/19/2015 3:35 PM |
| 96 | Stop combining bibliographic records when the publisher's name(s), dates of publication, pagination, etc. do not match for pre-1900 imprints. Not only for those that were cataloged under DCRM(B) or other rare materials cataloging rules or guidelines. | 10/19/2015 3:34 PM |
| 97 | 7xx#5 | 10/19/2015 3:32 PM |
| 98 | I miss RLIN very much. But from what I've heard, the foundation and architecture of Worldcat makes copy-specific information inappropriate. | 10/19/2015 3:32 PM |
| 99 | Keep the Institutional Records and encourage their use for rare materials | 10/19/2015 2:35 PM |
| 100 | N/a. | 10/19/2015 10:47 AM |
| 101 | Being able to click through from a holding library's symbol on WorldCat to the corresponding record in their local system would be nice, but I understand that this depends on the way the link is structured in the holding library's system. | 10/19/2015 10:18 AM |
| 102 | not at this time | 10/19/2015 9:09 AM |
| 103 | No. | 10/19/2015 8:45 AM |
| 104 | I know that Sarah Eleman from Columbia sent a proposal to OCLC Regarding Chinese rare book IRs. I wish OCLC could take some action on it. | 10/16/2015 5:30 PM |
| 105 | A more structured form of institutional record sounds like the best approach. | 10/16/2015 5:20 PM |
| 106 | No suggestions, but rather an appeal to make them more accessible. Both the rare materials cataloger and the scholarly community would benefit. | 10/16/2015 4:06 PM |
| 107 | What if we could click on an institution code and see the version of that institution's record as it was most recently exported from OCLC? | 10/16/2015 3:43 PM |
| 108 | Let institutions have individual records in a cluster like we used to have with RLIN. | 10/16/2015 3:35 PM |
| 109 | Going to each library's catalog to see copy-specific notes works, however is cumbersome and time consuming. It would be great if OCLC could gather all that information together in a nice little package. | 10/16/2015 3:33 PM |
| 110 | I don't, but I think it's genuinely needed! | 10/16/2015 3:09 PM |
| 111 | test | 10/9/2015 4:46 PM |

Q10 Do you have any further comments/suggestions?

Answered: 99 Skipped: 121

| # | Responses | Date |
|----|--|---------------------|
| 1 | When RLIN and OCLC merged, we chose to migrate our records as IRs. When we did a reclamation project in 2009 we decided to give up our IRs. We carry local information either in \$5 designated fields in master records, or solely in our copy of the downloaded record in our own local integrated library system (usually the latter). This begs the question, what will we do when we have to join a cloud-based system? | 12/7/2015 3:00 PM |
| 2 | Users who are looking at copy specific data are likely looking for this information on all known copies. Displaying the notes for the local library in the World Cat local search is not fully meeting user needs. | 11/30/2015 9:33 AM |
| 3 | No | 11/19/2015 4:35 AM |
| 4 | NA | 11/18/2015 4:56 AM |
| 5 | Please lobby OCLC to make these easily accessible. | 11/17/2015 3:12 PM |
| 6 | No. | 11/16/2015 2:03 PM |
| 7 | I hope to become more able in cataloging rare / unique materials on OCLC and to make local records showing info on bindings, inscriptions, etc. | 11/16/2015 10:45 AM |
| 8 | Good luck. | 11/16/2015 10:32 AM |
| 9 | This is tangential to the current discussion but still highly relevant to rare/special collections because they are so often gifts: Can we work toward adding \$u to the 541 field for donor and gift websites? A few months ago I saw a flurry of discussion on the listservs about how Harvard and other institutions are using 856 fields to link to donor and gift information pages. While this is a valuable copy-level addition to a record, I find it a mis-use of the 856 which is supposed to link to information or digital surrogates of the item at hand, not necessarily the provenance for one of its copies. | 11/16/2015 10:27 AM |
| 10 | I am the cataloger at an art museum library and I rely very heavily on the information in IR records that are currently in OCLC. It would be such a waste for that information to disappear. | 11/16/2015 10:12 AM |
| 11 | I think copy specific info should only be allowed on IRs, with maybe a couple of exceptions for rare materials. Copy specific info really belongs in item records, not bib records. I do think it is okay to add notes, that while they may not apply to all instances, they do apply to multiple copies (e.g. "Some copies bound with last 10 pages inverted" or something similar.) | 11/16/2015 10:06 AM |
| 12 | I would hope U.S. catalogers can encourage our colleagues elsewhere to add copy specific information. | 11/16/2015 9:36 AM |
| 13 | Question 7 is not applicable since we do not use IR's (having never been a former RLIN member) | 11/16/2015 9:13 AM |
| 14 | We don't actually catalogue on WorldCat. However, we'd just like to emphasize that it can be useful to us and other institutions to be able to access local information through OCLC. | 11/15/2015 10:04 PM |
| 15 | Minimize the number of records for one edition by hiring a trained cataloguer who can combine clearly duplicate records for the same edition. | 11/14/2015 3:47 PM |
| 16 | we are not at present cataloguing directly in Worldcat, but will be doing so within 6 months via WMS (+Record manager). | 11/14/2015 10:29 AM |
| 17 | Copy specific information is becoming increasingly important to librarians and users, with the growth in the study of books as material culture. Service providers ignore this at their peril. | 11/14/2015 8:40 AM |
| 18 | copy specific information is invaluable for rare books | 11/14/2015 12:34 AM |
| 19 | No | 11/13/2015 12:29 PM |
| 20 | answered for the situation now. 3,4,5,6 we can answer with: not yet, but within 6 months: yes | 11/13/2015 8:55 AM |
| 21 | Please see above. Thanks! | 11/12/2015 9:06 PM |

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| 22 | Local holdings records may be a good way to share some copy specific info via Worldcat. If OCLC could make LHRs searchable, as is the case now for MARC holdings in some library systems, researchers would be well served. Further, since LHRs are based on the MARC holdings format, most libraries already have some data in them (call numbers, copy numbers, serial holdings statements). Existing data could be enriched with, for instance, binding and provenance data for specific copies (entered in MARC holdings format 563 and 561 fields just as in MARC bib format) in library's own system and then batchloaded to OCLC. | 11/12/2015 6:55 PM |
| 23 | Copy-specific information is of increasing importance to rare books and special collections researchers and librarians, so any measures to increase its visibility are welcome. | 11/12/2015 10:27 AM |
| 24 | I'm told by OCLC that LBD won't work with Connexion, so it looks as if we'll have to let our IRs be deleted, revise/create master records and export them to our inhouse catalog (copies of all our IRs) and complete them there. | 11/12/2015 9:06 AM |
| 25 | No | 11/12/2015 4:59 AM |
| 26 | Copy-specific information MUST be kept at copy level | 11/12/2015 4:13 AM |
| 27 | not yet | 11/12/2015 4:12 AM |
| 28 | WorldCat should be less blurred and frbred - now copies are brought together that are not identical editions at all.I think that WorldCat should offer two systems: one for the general public that isn't interested in the book as a physical object but just in its contents and a second, more specialist system fot researchers. The backside should be constructed in such a manner that all information like provenances, book bindings etc can be described. The front of the system shows information depending on the user (general or specialist) | 11/11/2015 4:12 PM |
| 29 | It is absolutely essential for scholarly and legal reasons, that fields for provenance and copies with handwritten annotations (libri annotati) are created in LHR (local 700 and 710-fields). In the case of bequests the donor usually demands that the provenance be mentioned in the catalog record, as part of the contract. The library has to provide for this. | 11/11/2015 8:53 AM |
| 30 | - | 11/11/2015 7:32 AM |
| 31 | It is regrettable that the 700- en 710-fields are not included in the Local Holding Record. We would like to use those fields for copy specific information as former owner, annotator &c. Those fields should be in the Local Holding Record for persons, families or corporate bodies associated with an item, as the RDA Toolkit says. We could use a LBD, but that would imply that item specific information will be spread over LBD and LHR. | 11/11/2015 5:39 AM |
| 32 | It would be useful to automatically receive reports when record merges break the link between a master record and the embedded link in the local catalog. It would also be useful to mark records that describe items that are unique (do not exist in multiple copies such as manuscripts, archives, art objects, etc.) as such, so automatic merges could not take place. | 11/10/2015 4:05 PM |
| 33 | Keep the Institutional Records. | 11/10/2015 2:42 PM |
| 34 | Especially when it comes to pre-1800 imprints, the "master record" idea just assumes publications to be more uniform than they actually are. Anything you can do to make that model more sophisticated will be helpful. | 11/10/2015 1:59 PM |
| 35 | A major loss with the deletion of IR records is the searchability in Worldcat for provenance information. One does not always know what specific library might hold an item of interest that was owned by someone else, specially bound, etc. As provenance history has been gaining more interest among scholars in the last few decades, this is a huge blow to their work. | 11/10/2015 11:36 AM |
| 36 | Please do not show copy specific information at a general level | 11/10/2015 10:19 AM |
| 37 | No | 11/10/2015 7:23 AM |
| 38 | Search engine, though, is so primitive, which it could be enhanced and more usefully faceted. | 11/10/2015 7:07 AM |
| 39 | Please keep copy specific information in bibliographic records accessible and searchable for anyone using Special Collections in any library | 11/10/2015 5:21 AM |
| 40 | It is essential that copy-specific information not be stripped from OCLC records. The capacity for WorldCat to facilitate bibliographical research, or searches for copies of manifestations having certain features, is immense, but only if the data can be found. | 11/10/2015 4:17 AM |
| 41 | We are very happy about having LBD records as an option for us. | 11/9/2015 2:49 PM |
| 42 | Copy specific information needs to be retained when communicating with external systems (e.g. Hathi Trust) | 11/4/2015 10:29 AM |
| 43 | Thanks for doing this survey. | 11/2/2015 5:42 PM |
| 44 | If the institution records disappear from public view, they should at very least still remain "behind the scenes" so that copy-catalogers can still use them as a template. | 10/30/2015 9:47 AM |

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| 45 | For me, the issue with the phasing out of institutional records is less about the copy-specific information than about the quality of the institutional records as opposed to the OCLC master records. IRs are often more detailed, have more subject headings, added entries, and genre/form headings than master records, and are more useful for copy- cataloging the types of materials found in a special collections environment such as mine. | 10/29/2015 4:42 PM |
| 46 | Our resources are buried because they are unique, and students don't click on the "find all editions" button to know that we have rare early editions that they are encouraged to use. | 10/29/2015 11:57 AM |
| 47 | My institution creates IRs in batch from our local catalog, so no individual creates them manually but they exist for all of our records. | 10/28/2015 5:33 PM |
| 48 | The more opportunity you offer Rare Book and Special Collections librarians and catalogers to specify the unique descriptions and characteristics of their holdings the better. With security a growing issue, this resource can assist all of us keep our collections safe, and be valuable assistants to our colleagues should we find something that may not belong in the place it's ended up. It also helps us maintain a much more robust description to assist the most important reason we curate these collections---our patrons | 10/28/2015 4:10 PM |
| 49 | Copy specific information is essential in describing your resource. | 10/28/2015 11:59 AM |
| 50 | If there were some intuitive way to access data from IRs in the public view of WorldCat, especially non-confidential information on signatures, inscriptions, and provenance, I think this would greatly promote the adoption and use of IRs. | 10/28/2015 10:43 AM |
| 51 | Right now it's very confusing to be able to compare where one creates either LHRs or LBDs (I believe only through WorldShare Metadata services and WHICH platforms they are discoverable. Some of us are still on Connexion and the implications for workflow also need to inform our decisions re: discoverability for our local data, but getting a clear answer from OCLC seems to be difficult. I can only get a portion of the "picture". | 10/27/2015 4:18 PM |
| 52 | We do not have IR's, so question 7 is irrelevant. | 10/26/2015 4:10 PM |
| 53 | No. | 10/26/2015 4:02 PM |
| 54 | it would be best if the information was kept as clean as possible; for example, I was looking for a particular item in my library that supposedly had a fore-edge painting, but that information was from the OCLC record and not adjusted for the item in my library.... | 10/26/2015 3:21 PM |
| 55 | OCLC is going to make the work of researchers, not just catalogers, a lot harder by eliminating local records. At a certain point, WorldShare will become useless for serious researchers and a competitor will develop, funded by major research libraries with deep pockets and access to granting organizations. WorldShare is already problematic for individuals looking for early or rare materials. I could not find something with a known item search at a research library and was told by public service staff that the problem was not unique to myself. | 10/26/2015 1:04 PM |
| 56 | no | 10/26/2015 8:09 AM |
| 57 | Nope, just the thing above; and thanks! | 10/23/2015 3:19 PM |
| 58 | When doing humanities research, data is good. Author/title data is not enough. Me and researchers like me need to know data that is strictly copy-specific: provenance, condition, annotations, variation, etc. | 10/23/2015 2:41 PM |
| 59 | NO | 10/23/2015 1:41 PM |
| 60 | Thank you! | 10/23/2015 1:26 PM |
| 61 | Thank you---this is extremely important to anyone doing historical research. | 10/23/2015 1:03 PM |
| 62 | Regarding question 7, we did not have IRs in Connexion, so there is nothing to delete. | 10/22/2015 3:41 PM |
| 63 | Once we understood that OCLC had reached a firm decision to phase out access to the data contained in Institutional Records, and to limit LBD access as well, our library chose not to convert our IR's to LBD at all. It is disconcerting to think of the rich bibliographic detail that will consequently be lacking from the display of our holdings on WorldCat forever; however, we trust that the quality of the data in local OPAC(s) will sustain the needs of us metadata professionals and any other researchers who take the extra time to search for it in local catalogs. In my opinion, this single step forward for OCLC amounts to a regrettable setback for the shared cataloging community. Thank you, and good luck advancing the results of this survey | 10/21/2015 4:29 PM |
| 64 | We are interested in testing the parallel path of exposing this data in other ways, beyond OCLC or with OCLC (but not necessarily in LDB in WorldCat). We would also like to know if anyone is looking at ways to share copy-specific data *independently* of WorldCat, e.g., by exposing RDF catalog data to commercial search engines or providing SPARQL endpoints. | 10/20/2015 4:29 PM |
| 65 | Save the IR!! | 10/20/2015 12:25 PM |
| 66 | Thank you for your work!! | 10/20/2015 12:21 PM |

| | | |
|----|--|---------------------|
| 67 | More information about bindings; too few libraries record binding information, making research difficult, particularly for 'ordinary' trade bindings | 10/20/2015 12:16 PM |
| 68 | Our institution is now using Alma which requires a Master Bibliographic Record in the Network Zone for all campuses in our system. Copy specific (CSI) information in the OCLC Bib. Record is a problem both for CSI for our copy and CSI for other institutions. (i.e. adding ours or deleting others) It appears to be a problem with no solution. | 10/20/2015 12:12 PM |
| 69 | No | 10/20/2015 11:25 AM |
| 70 | This has bugged me since day one, as I cannot create accurate (or even remotely accurate) records for the collections that I deal with on a daily basis. The existing system may actually suppress access to archival collections and interesting copies of rare books. | 10/20/2015 9:59 AM |
| 71 | OCLC is now pretty useless for rare materials cataloging. I don't see much point in having my catalogers work in OCLC--our local system works better and we can always export those records. even though no one will ever see them. | 10/20/2015 9:00 AM |
| 72 | I haven't seen any discussion of the problems that arise in a shared catalog like OhioLINK, where my institution's records can be replaced by any other member institution. any time. | 10/20/2015 8:35 AM |
| 73 | n/a | 10/20/2015 8:30 AM |
| 74 | no | 10/20/2015 8:21 AM |
| 75 | Thank you very much for offering this survey. | 10/20/2015 2:22 AM |
| 76 | I understand that Connexion will eventually be phased out; MARC is going away, and changes in cataloging standards are right around the corner. Perhaps with all these changes, there is an opportunity to re-think how items are recorded. I'd suggest catalogers and librarians consider partnering with programmers and designers to imagine what's possible--workshops, seminars, discussion groups, etc. | 10/19/2015 10:49 PM |
| 77 | There are far too many problems with WorldCat--unrecognized variants treated as one; simple mistakes that create the impression of non-existent variants etc. | 10/19/2015 10:33 PM |
| 78 | Thank you very much for your working with OCLC to make somewhat less disastrous adverse effect of their termination of IRs support. | 10/19/2015 7:47 PM |
| 79 | It really does seem that, sadly, copy cataloging is an increasingly devalued aspect of rare books. To OCLC and many institutions, who've somehow not felt strongly enough (outside the rare books community) to raise an objection OCLC responds to. | 10/19/2015 5:23 PM |
| 80 | N/A | 10/19/2015 4:43 PM |
| 81 | If lengthy records was not a consideration, I could imagine adding a section in the record for certain local information with library identifier. These would include fields ending in \$5 [institution code]. Each such field would display as a separate line. The MELVYL catalog of the University of California once used such a feature to accommodate information supplied by individual university libraries. | 10/19/2015 4:42 PM |
| 82 | I would like to know more about LBDs and IRs. Perhaps if I understood them I would want to use them. Thanks. | 10/19/2015 3:53 PM |
| 83 | Explanation on questions 5-7: We have created LBD created as an OCLC batch from an export from our ILS. We also so do not plan to migrate the few IRs we had in addition as we also have LBDs from those. | 10/19/2015 3:40 PM |
| 84 | Clarifying the rules for when to create a new record in OCLC for rare materials and in light of RDA would be exceedingly helpful. Currently, the conflation of issue/state on the same Worldcat record has led to a necessary reliance on local information. If OCLC would like us to use master records more frequently, these guidelines should be reassessed. | 10/19/2015 3:38 PM |
| 85 | I mourn the loss of RLIN, but I don't think OCLC has an answer. I don't see another solution other than providing better links in OCLC to specific copies in local institutions. | 10/19/2015 3:32 PM |
| 86 | Notre Dame records copy specific information in our local online catalog but not on WorldCat. | 10/19/2015 3:23 PM |
| 87 | In #7, above, it was not I, personally, but my institution that made the decision and deleted our IRs | 10/19/2015 2:35 PM |
| 88 | N/a. | 10/19/2015 10:47 AM |
| 89 | IR's were ideal for the purpose of cross-checking rare books. Sorry to see them go. | 10/19/2015 10:18 AM |
| 90 | not at this time | 10/19/2015 9:09 AM |
| 91 | I don't believe copy specific information belongs in WorldCat records. | 10/19/2015 8:45 AM |
| 92 | Thanks for doing this survey | 10/16/2015 5:30 PM |
| 93 | no | 10/16/2015 5:20 PM |

| | | |
|----|--|--------------------|
| 94 | Keep the IRS!!! | 10/16/2015 4:06 PM |
| 95 | Some of what I search for in the catalogs of other libraries is not copy-specific information at all, but more detailed information. I think sometimes a skimpy master record is not upgraded because it's not clear whether the item in hand is representative of that manifestation or whether the master record simply lacks sufficient detail to make a determination. | 10/16/2015 3:43 PM |
| 96 | Because we catalog locally and the records are taped out to OCLC, I do not directly work in WorldCat. However, I think it is important to adhere to a principle of "no metadata left behind". What do we have \$\$\$ and \$\$\$ for, anyway, if not to allow for some local information to reach the users? | 10/16/2015 3:40 PM |
| 97 | I hope this effort is successful in retaining local information! | 10/16/2015 3:36 PM |
| 98 | Implement links from the OCLC Connexion Client record to the institution's local catalog. | 10/16/2015 3:35 PM |
| 99 | test | 10/9/2015 4:46 PM |

Appendix E

BSC Directory of Internet Resources: Additions – January 2016

ADDITIONS:

<http://rbms.info/files/dcrm/translations/dcrmb-es.pdf> Unofficial translation of DCRM-B into Spanish, courtesy of the Universidad de Buenos Aires in Argentina

<http://www.treccani.it/biografico/> Online Treccani

<https://www.flickr.com/photos/bookhistorian/> Early initials from Paul Dijstelberge

<https://provenanceonlineproject.wordpress.com/about/> POP, Provenance Online Program

http://www.cervantesvirtual.com/controladores/busqueda_avanzada_form.php Biblioteca Virtual de Miguel de Cervantes

<http://catalog.hathitrust.org/Record/000140237> NUC Pre-56. For a table of contents for the 754 volumes see <http://www.loc.gov/catdir/cpsa/mansell.pdf> here

<http://www.vhmmml.org/> Virtual Hill Monastic Manuscript Library, go to Education for paleographical resources in Latin and Syriac

<http://ica-proj.kartografija.hr/for-librarians.en.html#proj> Mathematical data for bibliographic descriptions of cartographic materials and spatial data. Not new but a resurrection in part of Jan Smit's website.

<http://www.lib.uchicago.edu/e/collections/maps/centraleurope18/> !8th century maps of Central Europe from the University of Chicago Library

<http://manuscriptevidence.org/> --Research Group on Manuscript Evidence

<http://lichen.csd.sc.edu/manuscriptlink/> Manuscript-Link, images of fragmentary codices

<http://www.lostmss.org.uk/> Lost Manuscripts—includes images