chair, Margaret Foote (Eastern Kentucky University); vice-chair, Carrie Preston (Ohio University); secretary, Valentine Muyumba (Indiana State University); treasurer, Michael Farmer (Ohio University); past-chair, Dianne Grayson (University of Southern Indiana).

5. Concurrent Sessions

The afternoon continued with concurrent sessions on a variety of topics. Lois Schultz (Northern Kentucky University, NKU) presented on "The Transformation of Technical Services to Knowledge Management Services." Schultz outlined NKU's effective approach to providing what their patrons wanted in a timely manner and how the library reorganized itself to facilitate this goal. Two other sessions also addressed changes in organizations to address new challenges and trends. The last sessions of the day were panel discussions on three topics. One panel presented on three RDA related topics: Name-Authorized Access Points, FRBR/RDA Serials Cataloging and Talking to Public Service Staff about RDA. Taemin Park (Indiana University) covered the changes in serial records as RDA is implemented. Her presentation was full of examples and details as she outlined the various similarities and differences between the two sets of rules. The other panels covered new roles and workflows for technical services and deselecting materials from library collections.

6. Vision Session

Friday morning, conference attendees gathered to hear the second vision session, "There's a Goat in my Keynote: What a Baby Goat Taught Me about 'Network Power' and Implications for Libraries," by Kathryn Hamish (director for Network Experience at OCLC). The star of this session was Buttermilk Sky, a baby goat. Hamish humorously described how Buttermilk Sky accidently became an Internet sensation via a YouTube video thus giving Hamish a perfect lead in for discussing how libraries can leverage networks and connections to their advantage.

7. Concurrent Sessions

After the break, there were two more rounds of concurrent sessions. In the first round, Stephanie Faulkner (ProQuest) presented on "Forging Collaboration Outside the Library and into the Alumni Office: Increasing Alumni Engagement by Meeting a Growing Information Need." Faulkner explained a new service from ProQuest that can be licensed by libraries or universities to provide information resources to their alumni. More and more libraries are getting requests from alumni and this is one way to respond to their needs. Other presentations included information about mobile apps that would be of interest to technical service librarians and using existing metadata for the discovery of collections. The final round of concurrent sessions included topics such as "Z-books: Hunting Down Zombie Ebooks Hiding in your Catalogs," by Kathryn Lybarger (University of Kentucky); "Digitizing and Describing History for Curricular Use: Opportunities and Challenges for Technical Services Staff," by Diana Nichols (Ohio University); and, "120 to 12: Reducing Days to Shelf with Vendor Services, Cat-on-Receipt and Automated Bib Overlay," by Sherle Abramson-Bluhm (University of Michigan).

As always the OVGTSL annual Conference provided a good opportunity for colleagues to gather together to learn and network and have some fun.

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RDA & Serials: Transitioning to RDA within a MARC21 Framework (Preconference Workshop, NASIG 2013 Conference)

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1. Introduction

To better prepare workshop registrants, presenters Les Hawkins and Hien Nguyen (Library of Congress) posted links to self-study training modules on CONSER's RDA & Serials: Transitioning to RDA within a MARC21Framework Web page. Registrants were asked to complete the assigned prerequisite modules before the preconference and actively encouraged to register for a live Webinar on "FRBR Fundamental Concepts and RDA Toolkit," on May 29, 2013. This interactive online class served as an extended question-and-answer session for topics covered in the prerequisite modules.

2. Day 1: Welcome and Logistics

To kick start the proceedings of the first on-site session, co-presenters Hawkins and Nguyen invited attendees to share their thoughts and experiences with Resource Description and Access (RDA) as well as their expectations about training objectives. It was observed that, to date, most RDA training has been geared towards cataloging monographic works and Nguyen took this opportunity to remind the group that the preconference would focus exclusively on cataloging serials. The presenters emphasized that the educational framework for both on-site sessions was patterned according to the "learning as you train" model espoused by the Cooperative Online Serials Program (CONSER) of the Program for Cooperative Cataloging (PPC).

Nguyen pointed out that RDA testers were initially trained without the FRBR model and that all subsequent training materials were specifically designed for Library of Congress (LoC) users. Hawkins emphasized that the learning process relies heavily on figuring out how to navigate the RDA Toolkit. Nguyen reviewed the planned agenda and schedule before introducing the class to the contents of the folders provided. Said packets consisted of presentation handouts, quizzes, exercises, and surrogates. Additional documentation included appendices comprised of links to supplemental documentation, a glossary, cheat sheets for MARC21 Tagging and Serials, and Working with Copy — Changes over Time, answer-key sheets, an evaluation, and information regarding free toolkit access. Several parties were acknowledged and heartily thanked for contributing their subject expertise and for granting

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permission to use materials they had created for this course. Participants were likewise encouraged to ask questions.

3. Module 1: Introduction to CONSER RDA Cataloging

Nguyen launched into the first module with a comprehensive survey of the RDA documentation available via the CONSER home page. Deemed the "stars of the workshop," this documentation covers RDA core elements, MARC21 to RDA core elements, and the RDA cataloging checklist, all of which were designed to operate as a bridge during the transition from MARC21 to RDA and evolved by courtesy of the RDA testers and task group based at University of California, San Diego (USCD). A key portion of this documentation is a table organized by the RDA/FRBR identity structure which includes explanations of data elements, levels, and symbols. The CONSER to RDA chart also describes the treatment of special notes while identifying and mapping core elements.

Additional documents pertinent to electronic serials were also highlighted and are publicly accessible via the PCC Web page, specifically the Provider-neutral E-resource MARC21 Record Guide and the Post Implementation Guidelines and Standards. Nguyen reminded attendees that these guidelines remind us that, until finalized guidelines are written, catalogers will have to "wing it."

RDA records can be easily identified by their coding. Nguyen suggested that catalogers look for 'rda' in subfield 'e' in the 040 field and verify the presence of code 'I' in leader/18. Because RDA is silent regarding punctuation, the LOC decided to continue using International Standards of Bibliographic Description (ISBD) punctuation during its test training. Hence, there has been no change in that particular PCC practice and CONSER and PCC records still utilize ISBD punctuation. Because the PCC language is English, it should be the record default.

Another example of an unaltered LOC practice is how discs are measured in inches but other organizations are welcome to refer to the guidelines and may opt to transcribe these data another way. RDA considers 'cm' to be a symbol and suggested that catalogers refer to RDA instruction 1.7.1 in order to ascertain how 3XX fields end with regards to punctuation. Applying RDA to the MARC21 container could lead to the possibility of punctuation being completely eliminated at some point since systems could still display records however local practices determine.

Some data are transcribed in RDA although certain elements have been designated as core and must be included when creating a bibliographic record. Core records are those comprised of the minimal number of elements required to create a record. Other manifestation elements can be recorded with some adjustment but there are many exceptions to the transcription instructions for serials.

The implementation of core is CONSER's way to facilitate the transition by encouraging all record contributors to maintain a harmonious co-existence. Nguyen suggested that there is no need to include a data element that users don't need, especially if someone else will most likely enhance the record. She recommended that, if unsure as to whether or not an element is required, catalogers should refer to the tables; the presence of a 't' next to a given element indicates that it is considered core and should be transcribed accordingly. However, other elements should be treated as clues only and must be entered in newly devised MARC21 fields along with spelled out descriptions, such as volumes, editions, and illustrations.

One may see some PCC AACR2 records with a mix of elements and it is recommended that catalogers refer to the PCC Guidelines of Enhancing and Editing non-RDA Serial Records when dealing with hybrid records. Nguyen observed that the new fields listed above have resulted in fuller transcription of RDA, and some AACR2, records.

Nguyen then compared the terminology differences between RDA and AACR2, although some equivalencies exist. In AACR2, catalogers are familiar with the ontology of rules, areas of description, and physical description while RDA's equivalent terms are instructions, elements, and describing carriers. Essentially, the new ontology describes familiar concepts. AACR2 assigns classes of materials, has a general material designation (GMD), and generates miscellaneous notes while RDA concentrates on describing media types, content, carrier, and relationships. For example, the general material description once housed in subfield h of the 245 tag has been eliminated and is now being recorded in three separate note fields.

4. Module 2: Getting Started

Nguyen segued into the second module by clarifying that the RDA decision-making process is essentially the same as that used with AACR2. In a nutshell, catalogers must determine if the resource in question is a serial by referring to the first (or earliest issue) available and examining the preferred sources of information as instructed by RDA 2.20.2.3. Like AACR2, RDA requires that catalogers show their work by providing information about their cataloging, such as the issue used, title source, and latest issue consulted. When cataloging online serials, one must also include information regarding the provider and the date the resource was last viewed or accessed. RDA 2.2.2 does allow for serial retrospective exceptions. The module concluded with a quiz which pointed out that OCLC policy is to not remove the GMD from pre-RDA records unless you upgrade the entire record to RDA.

5. Module 3: Identifying Manifestations

After a quick break, Hawkins explained how to identify manifestations and transcribe metadata relevant to carrier type and numbering. Like AACR2, the statement of responsibility is a core element although RDA does provide an alternate way to show responsibility by using subfield $e to enter the sponsoring body. Hawkins suggested tips to use when dealing with special cases because, although many steps are familiar to catalogers, it is critical to watch for subtle differences, such as omissions from the beginning or end of titles. He also recommended paying close attention to corporate name titles and inserting notes describing the type of resource that was previously bracketed as other title information.

RDA 2.3.1.5 says when corporate bodies are used as titles, catalogers must augment this data with 500 notes for proceedings, meetings, conferences, etc. Given this scenario, a 111 field would also be used. For devised titles, refer to RDA 2.3.2.10 which eliminates the need for brackets although it must be explained in a 500 that the title was devised by the cataloger. Examples of how to handle variant titles, even minor changes, are provided in RDA 2.3.6. Transcription of publication statements no longer occurs in the 260 field but has instead moved to the new 264 field. PCC guidelines state that catalogers should use the 264 field and describes how to convert 260 fields in existing AACR2 records.

When identifying manifestations, catalogers must assess extent, content type, media type, carrier type, frequency, and numbering. For guidance in determining extent, catalogers should go to RDA 3.4.10 which covers transcription of numbers and type of units/subunits that make up a resource. If known, one must give the complete and full extent of a ceased serial. Covered in RDA 2.1.4, frequency is not core although CONSER records require current frequency if available. Former frequencies are not required when creating an original record.

Numbering transcription is addressed in RDA 1.7 and RDA 1.8 states that numeric values should be expressed as numerals while words should be used for chronological terms, e.g. twenty-first century. RDA 2.6 provides basic instructions for how to record numbering and provide details about sources and specific situations. Just as with AACR2, RDA relegates numbers for serials' sequential designations to MARC21 362 with a first indicator of 1.

RDA 3.4.10 counsels that if the actual number is unknown then the cataloger should at least enter the term "volumes" or another appropriate carrier type in the 300 field. RDA core mandates that catalogers provide the appropriate carrier term for ceased serials and permits it to be