Standards and library services - American experience

Sally McCallum
Library of Congress
smcc@loc.gov
Topics

- Networking environment
  - diversity, options, flexibility
- Services standards support
- Essential Standards
Notes

- American experience
- Some points match your environment, others may not
- You are best judge

Keys:
- Standards
- Evolution
General Framework

- Utilities
- Networks
- System vendors
- Book vendors
- Record vendors
- A&I services
- Internet search engines
- National Libraries
- University libraries
- Research libraries
- Public libraries
- School libraries
- Corporate/Special libraries
- Online resource suppliers
American library landscape features

- Diversity at all levels - systems used, size, collection type
- Competition - systems, record suppliers
- Need for cost savings
- Voluntary cooperation
- Use of standards (long history)
  - Transfer: MARC 21, Z39.50
  - Content: ISBD, AACR, LCSH, LCC, Dewey
Library services

- Online union catalog
- Online catalog
- Online ILL
- Retrieval across different systems
- Online virtual union catalog

- Copy cataloging
- Retrospective conversion
- Cooperative programs
- Cross domain retrieval
- Access to electronic resources
- Special topic catalogs
Online union catalogs

- Network utilities (bibliographic):
  - OCLC - Online Computer Library Center
  - RLG - Research Libraries Group
  - now over 7000 record creation members
  - now over 40,000,000 records in each

- What made these develop:
  - Development of MARC
  - Union catalog tradition
  - Copy cataloging tradition
Network utilities

- **Similarities**
  - Bibliographic and Authority records
  - Authority coordination
  - Internet access
  - Z39.50 access
  - Search charge
  - Credits

- **Differences**
  - Master record (OCLC)
  - Multiple record (RLG)
  - Record use charges (OCLC)
  - Contracts through regional nets (OCLC)
  - Contracts direct (RLG)
Network utilities

- Support:
  - Online union catalogs
  - Online ILL
  - Retrospective conversion
  - Copy cataloging

- Moving toward:
  - Access to electronic resources
Online catalogs

- System vendors (MARC 21) - all sizes:
  - Large: VTLS, ExLibris, Endeavor, Innovative, Horizon, Sirsi, GEAC, etc.
  - Smaller: SIRS/Mandarin, Follett, Mitinet, Minaret, Winnebago, CDS/ISIS, etc.
  - www.loc.gov/marc/marcsysvend.html

- Tools:
  - MARC review, Validator, MARCMaker, etc.
Copy cataloging

- MARC 21 record suppliers
  - Network utilities
  - Book vendors
    - records with books
  - Record vendors - CDROMs, online
- Library systems
  - Library of Congress
  - many Z39.50 accessible sites
  - FreeMARC
Copy cataloging

- Installed base of 1000s of MARC 21 systems
- Over 1,000,000,000 MARC 21 records in local and network systems
- Accessible to 100s of Z39.50 clients
- Thousands of librarians who “speak” MARC 21
Retrieval across different systems

- Many Z39.50 implementations - stand alone and part of most library systems
- System diversity could be a major barrier to sharing data
- Library systems encourage proprietary solutions - only share with like systems
- Z39.50 is open solution
Online virtual union catalog

- Regional and state-wide virtual union catalogs through simultaneous Z39.50 search of several sites
- Z39.50 gateways
- Flexibility for choosing sites for users to be able to access
- Need for attention to search capabilities in different systems (use Bath profile)
Cooperative programs

- Name authority cooperation
  - Essential but expensive part of cataloging
  - Over 300 libraries cooperating with LC
  - Over 700,000 name records
  - Master file at LC; file copies at OCLC, RLG, BL
    - fully automated contribution process
  - Standards: MARC 21, Z39.50, FTP, AACR
Cooperative programs

- Subject headings
  - over 50 regular participants with LC
  - online contribution to master file at LC
  - Standards: LCSH, MARC 21

- Bibliographic records (including CONSER)
  - over 30 members
  - online through the utilities
  - Standards: AACR, MARC 21
Cross domain retrieval

Experiment:
- Retrieval across library systems, museums, archives
- Building new union files
- DC and MARC both used, DC for its simplicity and generality
- ZING/SRW potential search protocol
Access to electronic resources

- Primary access now:
  - Web sites, of course
  - URLs in MARC records

- Potential access:
  - OpenURL
  - ZING

- Developing METS applications for resource interchange
Special subject catalogs

- Experimentation with OAI has just started
Essential standards

- Standard MARC records (MARC 21)
  - fundamental cooperative opportunities
    - union catalogs and interlibrary loan
  - copy cataloging and retrospective conversion
  - record consistency, quality control
  - training efficiencies
  - system selection variety
  - system migration efficiency
Essential standards

- Z39.50 Information Retrieval
  - supports copy cataloging and reference
  - software and hardware independent searching (across different systems)
  - search multiple sites as once (virtual union)
  - local interface for external searching and result displays (user friendly)
Our experience

- First established a union catalog environment and maximized potential for interchange
  - Obtained bibliographic systems with
    - Z39.50
    - MARC 21
  - Standardized current data
  - Copy catalog using Z39.50 or union databases
- Union catalogs support ILL, other user services
Our experience

- With environment established, now:
  - Adapting new developments in web, XML, internet - evolving
  - Implementing METS as we move into digital
  - Experimenting with ZING, OpenURL, OAI