



# Technical Services Law Librarian

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## Library of Congress Classification Web

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In early January 2001, I received an e-mail announcing that the Library of Congress Cataloging Distribution Service had chosen the University of Colorado Law Library to be an in-depth tester of *Classification Web*, a World Wide Web interface for the Library of Congress classification schedules. Although any interested person could use *Classification Web* during the testing period (January 1 to May 31, 2001), my library joined a group of thirty-two other institutions as in-depth testers. This diverse group of institutions ranged from single librarian operations to major research institutions, and included nine foreign sites.

Prior to January 2001, the tools I used for cataloging were the standard "paper" sources found in most law library cataloging departments: the Library of Congress Subject Headings "red books;" the full set of loose-leaf classification schedules compiled by Larry Dershem and published as part of the *AALL Publications Series*; and the full set of Library of Congress editions of the classification schedules. While these tools were completely adequate for my needs, the chance to test a web-based product was too tempting to pass up. This article will briefly describe *Classification Web* and my experiences with it over the past three months as I used it to revise copy cataloging, create original bibliographic records, and even perform reference work.

### What is Classification Web?

*Classification Web* (also known as Class Web) allows anyone with access to the World Wide Web to browse and search the full text of the Library of Congress Classification schedules and the Library of Congress Subject Headings. According to *Classification Web's* Product Support staff,

[t]he advantages of a web-based design ... are remarkable. *Classification Web* requires nothing but a web browser and an Internet connection. You don't have to install special software to run the application, you don't have to install the data and you never have to worry about updates — this is all done for you. You can run the application from anywhere in the world and on almost any type of computer (including those from Apple). There are no floppy disks or CD-ROMs to worry about, carry around or store. All you

*(continued on page 24)*

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On-Line Bibliographic Services Special Interest Section of the American Association of Law Libraries*

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### TSLL EDITORIAL POLICY

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# Technical Services Special Interest Section

Greetings, fellow TS-SIS members! In the last column I told you the news about exciting programs that our Section will be sponsoring or co-sponsoring in Minneapolis, the new TS-SIS Mentoring Program, and the first-time-ever "Managing Technical Services" workshop for which one member is being selected by the AALL Awards Committee to receive a *free* registration. This time I would like to update our members on some other activities in which your officers or committees have been engaged. I need to also make an *urgent appeal* for all members coming to Minneapolis to attend the TS-SIS Business Meeting on Sunday, July 15, 5:30-6:30 PM.

It is crucial to the ongoing health of this Section that we have at least 125 voting members attend this meeting. According to our *Bylaws*, twenty percent of the membership is needed in order to make a quorum. (There are currently 625 members.) This is a very stringent requirement, when compared to the other SIS's. Many of them do not mention a quorum or simply state that "a quorum shall consist of the members present at the meeting." Those that do specify a number give the figure as a minimum of 10, 15, 30 or 50 members. (That last one is the PLL which has 1600 members!) Last year in Philadelphia we only had about 65 members at the TS-SIS meeting. Obviously, this is one of the bylaws we are proposing for revision. But we will be unable to change it unless we have the 125 or more members attend the Business Meeting at least this one time. I guess this is a *Catch-22* of sorts. The complete list of proposed Bylaws revisions was sent to members in the mailing with TS-SIS election ballots. It is also on page 28 of this *TSL* issue.

My sincere gratitude goes to **Eloise Vondruska**, chair of the Bylaws Committee, for working on the bylaws.

In addition, her committee suggested many updates and additions to the *TS-SIS Handbook*, which has not been revised since 1994. Several procedures have changed in the last seven years, and some projects (such as the TS listserv and the TS website) were not even in existence back then. The TS Executive Board, which includes the chairs of all the standing committees, hopes to approve the various *Handbook* revisions at or before the Annual Meeting.

Another internal document, one that will have an even more direct impact on our members, is the *TS-SIS Strategic Plan*. A few months ago our VC/Chair-Elect, JoAnn Hounshell, used the annual survey to poll the membership about which goals and strategies are the most important. The results show that TS-SIS members want the section to focus mostly on *training* (including for those who cannot attend AALL meetings) and *professional networking* (such as collaborative projects, use of liaisons); and to a lesser extent, on *projects* (helping CRIV, creating Web-accessible model procedures) and *participation* (including roundtables, establishing core competencies). Further input on these objectives was gleaned from TS listserv discussions in April and May. We look forward to the next draft from the TS Strategic Planning Committee led by Caitlin Robinson. This is not mere "pencil-pushing," you know. Strategic planning helps us to assess our members needs, examine ways that the Section might meet these needs, and renew or revitalize our value to the association and to the profession. We must create a good foundation with this document, if future TS leaders are to use it to implement new or better projects and activities with which we can really take pride.

In other news, *congratulations* are in order for **Reggie Wallen** (Stanford Uni-

versity), this year's recipient of the Renee Chapman Award for outstanding contributions to technical services law librarianship. A frequent speaker and program coordinator at AALL, Reggie has also served as TS Cataloging & Classification Committee chair, member of the AALL Program Selection Committee, Secretary/Treasurer and a Member-at-Large on the TS-SIS Executive Board, a columnist for *TSL*, and as AALL's official representative to the ALA ALCTS Committee on Cataloging: Description & Access. Phew! It would be hard to match such achievements and such a wonderful record of service. Please join me in honoring Reggie when we present this award to her in Minneapolis. I would also like to thank Anna Belle Leiserson and Linda Tesar for the fantastic work they have done as *TSL* editors for the past three years. We welcome **Joe Thomas** (Notre Dame) as the new editor, beginning with the Sept. 2001 issue. Joe is a former TS-SIS chair and member of the *TSL* Editorial Board. We are confident that he will continue to impress us with the excellent newsletter that *TSL* has become. I am extremely grateful also to **Mary Lu Linnane** (DePaul University), who, as chair of the TS Awards Committee this year, cheerfully accepted an extra charge for her committee: drafting a set of policies and procedures for a new "continuing education grant" to be awarded by the TS-SIS (separate from those awarded by AALL) to help TS members attend AALL workshops. More details about this initiative will be available at the TS Business Meeting. **Will Meredith** (Harvard), chair of the TS Preservation Committee, expects to have a first draft of a *National Plan for the Preservation of Legal Materials* completed in June. It is certainly flattering to our section that the AALL Strategic Plan Implementation Committee feels that the TS-SIS committee is capable of addressing such an important project.

Since this is my last column as TS-SIS Chair, I would like to assess our progress. My personal mission this year was to reach out to our members who may be "under-served," particularly those who cannot attend AALL conferences. I think that the Mentoring Program is off to a good start, with 12 pairs (24 mentors and mentees) of TS practitioners already participating in it. And the aforementioned TS-sponsored educational grant might also assist some members who have previously been unable to do professional travel. I regret, however, that the initiative to build a website "clearinghouse" of model TS procedures and policies has been a slow-starter. We do need more volunteers to help with this, but there was no response to appeals I made for a smaller-law-library volunteer. I also wanted to explore the need for establishing a "TS Management" committee or roundtable; this unfinished business will be addressed

in Minneapolis. The TS-SIS may not have been as *visible* this year as it has been in the past; I never contributed any text about our goings-on to the AALL *Spectrum*, for instance. Nevertheless, I hope that the attention we have given in 2001 to administrative details (bylaws, handbook and Strategic Plan review and revisions) will lay the groundwork for bigger and better things from your TS leadership in years to come. I would especially like to acknowledge the help I received from **JoAnn Hounshell**, who is about to take over as TS Chair for 2001/02. She offered me many excellent suggestions, viewpoints and reminders throughout the year, and convinced me that you guys really knew what you were doing when you elected her! Also, there are members retiring from the TS Executive Board who have served us well—**Janet McKinney** as Immediate Past Chair was ever-faithful in responding to my e-mails when I needed input; **Cindy May** as

Member-at-Large was extremely vigilant in organizing the upcoming TS/OBS/RIPS/CS Joint Reception; and **Chris Long** and **Joan Liu** as chairs of the Cataloging & Classification Committee and the Serials Committee, respectively, for excellent work in their areas.

And now (drum roll, please ... ) I should like to announce the winners of the recent TS-SIS election: **Christina Tarr** (UC-Berkeley) has been elected the new Vice Chair/Chair-Elect for 2001/02, and **Kate Pecarovich** (UCLA) will serve as Member-at-Large for 2001-03. Good luck to these new TS Board members. I am looking forward to seeing them *and you* at the TS Business Meeting on Sunday July 15, in Minneapolis!



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## Online Bibliographic Services Special Interest Section

### From the Chair

It is hard to believe that another whole year of OBS-time is approaching its high point, namely the annual meeting, when many of us have the good fortune to meet and interact in person. In preparation, it is time for another update on what has been happening with OBS and what will be happening in Minneapolis in July. I am writing this at the very beginning of May, but by the time you read this, it will be June and you'll be getting ready to go to convention. Since this is a combined issue of *TSLL*, I will take this opportunity to recap the activities of OBS during the past six months as well as to try to psych you up for the OBS events to take place in Minneapolis.

#### Election

OBS was blessed with another excellent slate of candidates for the election, which took place in April. I want to

thank all of the candidates on behalf of OBS. Each has contributed a great deal to OBS already, so it is wonderful that they are willing to go even further and run for office. Thanks for the hard work in developing the slate go to Jack Bissett, OBS Nominations Committee Chair, who was ably assisted by Pam Deemer and Sue Roach.

Now that the excitement has built, here are your newly elected officers:

Vice-Chair/Chair-Elect:

Mary Jane Kelsey

Secretary-Treasurer: Richard Jost

Member-at-Large:

Judy Vaughan-Sterling

Congratulations and welcome to all!

#### OBS Survey

Many thanks to those of you who responded to the OBS survey! Ismael

Gullon (Vice-Chair/Chair-Elect) has compiled the results for publication in *TSLL* (see page 26). Conducting the survey is very time and energy-consuming (thanks Ismael!) The results have been shared with the OBS Board and Committee chairs. The survey solicits feedback on OBS activities and this informs the planning process among your officers, as well as the strategic planning process now underway (more on that later). The OBS survey and volunteer form will remain on the OBS website. We are always happy to receive your input about OBS, so please fill it out if you have not done so. We would be especially glad to have you volunteer your services to OBS. The only downside is that you are no longer eligible for the prize drawing. Michael Maben won the lovely afghan made by Susan Chinoransky. Congrats Michael and thanks Susan!

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## Education

The schedules for the educational programs, workshops, meetings and events to take place in Minneapolis are on AALLNET. In terms of SIS meeting times, OBS was fortunate to get all the slots we requested. We did our best to avoid major conflict with TS-SIS meetings, but a certain amount was unavoidable as usual. OBS sponsors or co-sponsors a number of programs, as well as one workshop. The AALLNET schedule does not include this sponsorship information, but if you are interested, look on the OBS website at: <http://www.aallnet.org/sis/obssis/meet2001.htm>

## Education Committee

Speaking of education, planning for the 2002 annual meeting is gearing up. Program planning is a difficult process and the sooner it gets started, the better. At the OBS Board meeting last July in Philadelphia, I proposed a change to the OBS education planning process, which the Board approved. The OBS Vice-Chair/Chair-Elect is also the Education Committee chair. I do not propose to change that, but just to change the timeline that person operates under in order to make the process smoother.

To explain, let me describe what has happened with the OBS program planning process until now, using last year's situation as an example. As the Vice-Chair/Chair-Elect, I conducted the annual OBS membership survey and compiled the results in February 2000. I made a list of people who had volunteered to be on the Education Committee. However, I did not know who would chair the Committee, as the newly elected Vice-Chair does this and we would not know who that was until May 2000. (I had chaired the previous year's OBS Education Committee as soon as I was elected Vice-Chair in May 1999.) Ismael Gullon was elected Vice-Chair in May 2000 and immediately I handed him a list of Education Committee members' names and a pile of information I had accumulated from my experience the previous year.

The important thing to keep in mind is that the deadline for program proposals

is mid-August. In terms of a timeline, that means Ismael had about 2 ½ months to form the Education Committee, get the word out, get the proposals down on the forms, and submit them to AALL headquarters—an enormous amount of work in a very short timeframe! And these are summer months, when people naturally take vacations and when July is basically consumed by the actual AALL meeting. Ismael and last year's Education Committee did a fine job as the list of OBS programs for 2001 clearly shows.

My objection to the timeline has nothing to do with the outcome, which have been many fine OBS programs at the AALL annual meeting in the past few years. But I think that is more a testament to the amazing ability of OBS Education Committee chairs and members to overcome a difficult situation than an endorsement of the process. My goal with this proposed change is to make the process less rushed for all involved. How will this happen?

**Change:** For this year, the Education Committee was formed in March 2001, with Ismael and myself as co-chairs. This will double the time for the Committee to form, get acquainted, get the word out, and begin getting program proposals down on paper. In May 2001, when the new Vice-Chair is elected, she will join the Committee to see how it works, but not in the role of chair, who is completely responsible for getting all proposals ranked and submitted by the mid-August deadline. Ismael and I will be doing that. The new Vice-Chair will instead chair the next year's Education Committee, whose work can again begin in February or March 2002, or perhaps even earlier, depending on when the request for volunteer members goes out.

This will be the new approach for the OBS Education Committee. The problem occurs in this "bridge" year, which is why Ismael and I will co-chair the current Education Committee. I feel very strongly about this being a change for the better, so I am backing it up by pitching in. Luckily Ismael agreed! In terms of program planning, logic says

that when the Education Committee meets during the annual meeting in July, the program proposals should be just about finished. That is not the time to start planning a proposal due in a month or less. We all know this makes sense, but it has not always worked out that way in the past and some of the frantic work right up until the proposal deadline has been incredible, but most likely avoidable. I hope this change will make it easier for OBS to better conduct program planning. I know of at least one other SIS that handles education in this manner and swears by it.

As I write this in very early May, the OBS Education Committee is formed and operating. To date, all volunteers have confirmed that they are willing to be active participants in the process, Ismael has shared program ideas from the OBS survey and examples of successful proposals from last year's work with the group, each member is carefully perusing the program material available on AALLNET, and e-mail discussions of program ideas are being exchanged. Tim Knight is OBS' liaison from the AALL 2002 Annual Meeting Program Committee and he has already been in touch with us to offer his assistance. In other words, we are already hard at work! If you have a program idea, please contact any member of the OBS Education Committee: David Bryant, Susan Chinoransky, Cindy Cicco, Pam Deemer, Susan Goldner, Janet Ann Hedin, Mary Jane Kelsey, Ismael Gullon (co-chair), and Ellen McGrath (co-chair).

## Research Activities

There has been a change in the coordinator of the OBS/TS Research Roundtable. LeGrande Fletcher and Becky Lutkenhaus co-coordinated the Roundtable in Philadelphia last year, though Chris Long substituted for LeGrande during the actual meeting. Unfortunately both LeGrande and Becky have had to step down from this role. LeGrande has also had to give up the *TSL* "Research and Publications" column. That's the bad news. But the good news is that Brian Striman has agreed to take on both these tasks, coordinating the Roundtable for

Minneapolis and writing the column. For those of you who may not know, Brian founded both these activities originally and he is thought of by many as synonymous with them. Reading Brian's column is always inspiring and often amusing and the high level of energy he brings to the Roundtable meetings is unsurpassed. If you have never attended, I would encourage you to do so this year.

On a related note, Brian has also agreed to become Chair of the OBS/TS Joint Research Grant Committee. (Thanks Brian!) He will replace current Chair, Corinne Jacox, when she steps down in July. Corinne has done an amazing job of publicizing the grant and coordinating the process over the past few years. She really got the grant process on its feet with the help of Committee members: Georgia Briscoe, Ruth Patterson Funabiki, Rosemary Hahn, Julie Stauffer, and Richard Amelung (ex-officio). Thanks to all for their efforts on this important grant work. And special thanks to Corinne for going way above and beyond!

### Strategic Planning

A lot has been happening behind-the-scenes on the strategic planning front all year. There have been personnel changes. Becky Lutkenhaus stepped down from the OBS Strategic Planning Committee, as she left law librarianship. Mila Rush has stepped in and has done a great job, with Chair Sally Wambold's help, of getting up to speed quickly and contributing immediately to the Committee's discussions. As a quick review, the members of the Committee are: Sally Wambold (Chair), Pat Callahan, Karin den Bleyker, Janet Ann Hedin, LaJean Humphries, Sue Roach (advisory), Mila Rush, Brian Striman, Ismael Gullon, and myself (ex officio). Please contact anyone on the Committee if you have thoughts about the OBS strategic plan. Gail Warren's expertise on the strategic planning process has been invaluable and she continues to counsel the Committee when we get stuck, which does happen now and then.



Sally has done a beautiful job of keeping the Committee on track, on time, and in touch with each other. The environmental scan (survey) results were compiled and distributed to the Committee, followed by the results of the regular OBS member survey. Discussion of OBS' mission statement has been resolved and work on the plan itself is underway as of the beginning of May. OBS will follow AALL's model in terms of structure of our strategic plan. This means we will use the same terminology: strategic directions, outcomes, and initiatives. The AALL plan is available on AALLNET at: <[http://www.aallnet.org/about/strategic\\_plan.asp](http://www.aallnet.org/about/strategic_plan.asp)>.

As I write this, the Committee is discussing three strategic directions for OBS. This includes the outcomes (what do we want to happen?) and the initiatives (how can we make it happen?). We are focussing on what can realistically be accomplished in the next 3-year period, but we will push to make sure that OBS is challenging itself and moving ahead. I want to thank Sally for her dedication to this project. It becomes clearer every day that she is indeed the absolute best choice for this task. Sally's experience in OBS, her great ability to focus and her superb organizational skills are of great benefit to her colleagues on the Committee as well as OBS as a whole. The strategic plan will be presented at the OBS Business Meeting in Minneapolis in

July. So be sure to attend and be the first to know where OBS is heading!

### Public Relations

I mentioned in my last column that the OBS brochure was going to be redesigned with the assistance of AALL HQ. As OBS' financial picture came into sharper view at the close of the calendar year, the OBS Board discussed this and decided it would be best to postpone the brochure work. This was dictated in part by the need to pay for more than one year of past *TSLLs* out of this year's budget. We can continue to use the current brochure and update the content as necessary. It will not have a highly polished look, but it will work fine. The OBS brochure is mainly used for distribution at the CONELL Marketplace, at the OBS table in the activities area of the annual meeting exhibit hall, and to new or potential OBS members.

I have tried to keep you informed of OBS activities and other information via the OBS-SIS electronic list throughout this year. I know that many of you also subscribe to the TS-SIS e-list and that some of my messages are duplicated there. I realize such duplication can be annoying, but please keep in mind that many OBS members are not subscribed to other lists and this may be their only way to obtain such information.

### Minneapolis

OBS will be busy during the AALL annual meeting in Minneapolis, July 14-19, 2001. Please check the OBS website as you prepare for your trip: <<http://www.aallnet.org/sis/obssis/>>. Important OBS meeting and program information is posted there for your convenience. Thanks to OBS' Webmaster, Maria Okonska, for her speed in getting such material up. OBS will once again co-sponsor the Joint ("Alphabet Soup") Reception on Saturday evening from 6:00-7:30 PM, along with TS, RIPS, and CS. Please come and meet your friends and make new ones. It's always a fun time. Susan Chinoransky (Member-at-Large) has participated in the planning of the reception on behalf of OBS (thanks Susan!).

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OBS will have a table in the Activities Area of the Exhibit Hall. The paperback swap will be there, so be sure to bring your already-read books to drop off. Then you can pick up a new one to read between meetings, on the plane, or wherever. But you don't need to drop one off to pick one up. Come and check it out. Then you can see the other goodies at the table too: OBS key tags and brochures, the *Law Library Systems Directory*, informative handouts, candy, etc. And if you are really lucky, you will get to meet some members of OBS while you are at the table. I think their professionalism, knowledge, and enthusiasm will impress you, as it has me.

### **TSLL Changes**

As you may already know, there will be some changes taking place after this issue in the leadership of this newsletter. *TSLL* is essential to OBS and TS. It is our voice to each other and to the world, including our members, AALL, other SISs, and other library associations. Anna Belle Leiserson and Linda Tesar have done an excellent job as editors of *TSLL*. The content and professional look of our newsletter is wonderful. And the team currently in place is responsible for this: Anna Belle and Linda, Cindy May (Business Manager), Martin Wisneski (Webmaster), and the numerous contributing editors (too many to mention here—please see the *TSLL* staff list in every issue). Putting out a terrific newsletter is no easy task, but all these people have spent hours and hours of their own time doing just that in order to benefit all of us. Please join me in thanking them all and especially Linda and Anna Belle as they complete their three year term as editors,

I admit to a sense of panic when I first heard the news, but almost immediately, Joe Thomas graciously volunteered to be the new editor of *TSLL*. Welcome Joe! And Linda Tesar is not leaving, but will step into the new role of Layout Editor. Cindy, Martin, and the contributing editors will be continuing in their roles. Thanks to all for your past and future work.

### **Final Thoughts**

Where has the time gone since I embarked on my journey as OBS Chair last July? I haven't a clue. I realized my year as Chair would be busy—and it has been. What I didn't know was how amazing you all are, you, the members of OBS. I had an inkling from the year before when I was Vice-Chair and when I was Member-at-Large before that. But this year, it really hit home for me. I know it's a cliché, but OBS *is* its members.

There are so many names listed in this column alone. These are all OBS members who stepped up. They volunteered for a Committee or for a task or they said yes when I asked them to do something. And they are only the tip of the iceberg. I have mentioned other names in earlier columns. We all participate in some way by paying dues, reading this newsletter and this column, answering surveys, voting in the election, responding to messages on the OBS e-list, serving on Committees, etc.

Why do we do it? Why do we give so much of our time and effort to OBS? That's the question that keeps popping into my mind. It's not like we don't have other things to do. The pace of my cataloging job has increased so much since I entered the profession many years ago that it sometimes scares me. I have the constant feeling that I'm working as fast as I can just to keep from getting too far behind where I am. I long ago gave up the idea of actually being ahead on anything. I assume it is the same for all of us to some degree.

So why do we do it? I have no other answer except that we value OBS and our fellow OBS members. And it's no wonder. I have met people in OBS that simply leave me awestruck. They handle their daily jobs beautifully, both the functional and the management aspects. They hire, train, and supervise staff, adjust workflow, and take on new responsibilities constantly. They do research and write for publication. They make presentations at and propose programs for all sorts of professional meetings. They ponder important

issues about our profession, they are visionaries. They even have families and full lives away from work. And perhaps most importantly of all, they like what they do and it shows. Their enthusiasm is infectious.

So that's why I do it—why I expend my time and effort on OBS. If I didn't, I would have missed the chance to meet and get to know my fellow OBS members. Their inspiration and collegiality sustains me in the face of the overwhelming changes we are all experiencing in our profession. I would be lost without them. I know that any further talk of a possible merger of OBS has been postponed until the new OBS strategic plan is complete and in place. But I do feel it is important that I convey a sense of the incredible energy that I see OBS members investing in this Section. After all, the Chair has a very unique vantagepoint. So even though content areas may overlap with other SISs, the current membership total of OBS is 348 and there are a number of people within OBS who have specifically chosen to devote a great deal of their time and energy to OBS. This should not be taken lightly.

### **Thanks!**

I want to close with a sincere thank you to the members of the OBS Executive Board: Georgia Briscoe, Susan Chinoransky, Cindy Cicco, Ismael Gullon, and Brian Striman. I can't express how much I value their hard work and wise counsel! I would also like to thank the Committee Chairs: Susan Goldner (Local Systems), Michael Maben (OCLC), Anne Myers (RLIN), Education (Ismael Gullon), Web Advisory (Maria Okonska), Nominations (Jack Bissett), and Joint Research Grant (Corinne Jacox). Thank you also to Richard Jost and Ruth Patterson Funabiki for representing OBS on the *TSLL* Editorial Board. Thanks to you—the members of OBS—you are a great bunch! I hope to see many of you in Minneapolis.



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## The Development of an In-House Acquisitions List

# Acquisitions

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Recently a question was asked on Law Acq about the development of in-house acquisitions lists.

Up until recently, Peter Ward was the known developer of acquisitions lists for law libraries. With changes in his company in 2000, however, it became apparent that he would no longer be able to satisfy the needs of many of the libraries that had previously relied on him.

While there has been discussion over the past several months, or perhaps even years, about developing in-house acquisitions lists, the issue has been given new momentum with the Ward situation. There are many options available to libraries, depending on how much time, effort or money one wants to invest. Some may go to OCLC to develop their list, others might try to find another outside vendor, and still others may want to develop their own in-house procedures. This article discusses the development of in-house procedures, and particularly the experience at the Marquette University Law Library.

There were basically four main things we considered as we chose to develop our in-house list

1. Is the list still needed?
2. What format should the list take?
3. How much effort will it take to develop the list?
4. What changes might be needed to make a better list?

Before we decided to explore the possibility of developing our list in-house, we had to decide whether it was even necessary. Our sense was that some people read the list faithfully, but a large number probably did not read it all that much. So a question was raised whether the list was even necessary.

In reality, this was not much of a question. After a bit of discussion, we decided that while the list can be a good tool, we needed to evaluate how we could make it better.

We decided early on that an electronic list would not be appropriate. Having an electronic list would mean that we would make it possible for faculty to place requests directly from the list. While technologically possible, we decided that this was not feasible at this time.

One possibility we had looked at in the past would have been to adapt the model set up by Yuan Yao, Head of Cataloging at Georgetown University Law Library. Yuan and Xiaowen Huang of Vector Research Inc. developed a Perl Script that takes the subject, title, imprint, call number and OCLC number for each new title, and ties it back to the catalog. The recipient of the list can then click on a link in the list and see information in the catalog.

While we considered this approach, we decided against it, primarily because we do not currently offer an option for faculty to request books from within the catalog.

After deciding that the list is important, and that we wanted to opt for a paper list, we then looked at what we had been providing and at what some other libraries had done. Next, we decided on a plan of action. We thought that the process of producing the list wouldn't be too difficult, but soon discovered that it is more complicated than we initially projected.

We discussed how the faculty use the list, what their needs are, and came to a decision that the list, if intended for the faculty, needs to be faculty-friendly. We then sat down with our reference librarians, and compared an existing list of

“Subject Areas in the Law Library” with a breakdown of the KF tables. From these discussions we were able to come up with a list of 33 “subject” categories (appended to the end of this article)<sup>1</sup>. We also developed a lengthier cross-reference list, so that we can ultimately have a controlled list that leads the reader into appropriate subject categories.

While developing the “list of 33 subject categories”, we were also developing the procedure for producing the list. Simply put, the procedure is as follows:

- .. Make a list in Innopac of the items cataloged in the given month;
- .. Compare that list to our “list of 33 subject categories”;
- .. Temporarily code the list according to the “subject categories.” (We insert a message field into the first item of each title in the list with the corresponding “subject category” number or numbers. Each category has a numeric equivalent, so for example “Administrative Law” is 01, “Alternative Dispute Resolution” is 02, and so on.) ;
- .. FTP key elements to a word processor to manipulate. The key elements include:
  - Item Location (Reference, Reserve, etc.), Call number, Title, Author, Imprint information, Edition, Description, Message field from the item record (with the subject codes);
- .. Clean up in a word processor (i.e. remove extraneous characters --we use TextPad<sup>2</sup> for this step);
- .. Load the list information into an Excel spreadsheet;
- .. Sort the list according to subject code (i.e. the “message” field) and then title;
- .. Mail merge in Word. It is in the mail-merge step that we finally pro-

duce the list. This involves not only creating the list, but cleaning up fields for the final product and adding see references.

Once we had developed the procedure and the "list of 33 subject categories," we were ready to create a test list. What we found is that the whole list can be produced in a matter of a few hours. The most time-consuming part is in coding and uncoding the message fields in Innopac, and then updating or beautifying the final list in Word.

Two other items we produce as part of this project include a separate cover page and a final page with numbers for

people to circle so they can request a book from us. We also discovered that it is more economical for us to print the list in house on a duplex laser printer, rather than sending it outside to photocopy.

As we become more comfortable with the procedures, we feel we should be able to shave additional time off of the monthly project. Through the development of this procedure, we are now able to create a more focused, better list, in a more timely fashion than we were able to do before.

<sup>1</sup>List of 33 Subject Categories: Administrative Law, Alternative Dispute Resolution,

Anti-trust and Trade Regulation, Business Associations Law, Civil Procedure, Commercial Law, Constitutional Law, Contracts, Criminal Law, Domestic Relations, Education Law, Elder Law, Employment Law, Environment and Health, Evidence, Foreign and Comparative Law, Human Rights, Intellectual Property, International Law, Jurisprudence, Legal Profession, Ethics and Education, Periodicals and Law Reviews, Practice Aids, Property (Public and Private), Regulated Industries, Sports and Entertainment Law, Tax Law and Public Finance, Torts, Wills-Trusts-Estates, Wisconsin Law, Other Areas of Law, Law Related Materials, Congressional Documents.

<sup>2</sup>TextPad is available from <www.textpad.com> G



I hope you all had the opportunity to sign onto <<http://lccweb.net/>> – the *Library of Congress Classification Web*. It calculates call numbers and seems to do a good job with the KF federal numbers where only the form tables are involved. It is a little trickier with the country tables and their accompanying form tables – 2 sets of tables to apply. It is something that we should encourage the Library of Congress to develop and make available. The project ended March 30. All of the K schedules were in *Classification Web*, including the ones not yet available on *Classification Plus*. Yes, even KBM Jewish law, KBP Islamic law, KBR history of canon law and KBU Catholic Church law were in the web version.

Issue 1, 2001, of *Classification Plus* should include the law schedule for

Germany. Hopefully *KBR* and *KBU* will also be in the next issue. Again let me recommend both *Classification Plus* and *Catalogers' Desktop* to all catalogers.

Looseleaves are still with us. I think mainly because our libraries all have the time to file those pages. Seriously, I do want to remind catalogers about the *Subject Cataloging Manual: Shelflisting* memo on dates in call numbers for looseleaves. It is memo G140, no. 3d and it states:

d. Loose-leaf materials. Do not add a date to call numbers for the following types of publications:

·Loose-leaf services that are cataloged as such and continuously kept up to date.

*Note: Although this rule applies to all classes, the vast majority of such publications are in Class K.*

*Note: In the rare cases where it is necessary to distinguish between different editions of these types of publications, use successive Cutter numbers.*

## Classification

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When this was first proposed at the Santa Clara Institute in 1992, some thought it would only apply to looseleaf services such as those published by Commerce Clearing House. However, the Library of Congress shelflisters applied it to all looseleaves that were updated including the Matthew Bender looseleaves. When another edition comes along, the cutter is expanded by adding either a "2" or "12" to the cutter for the earlier edition. I have seen both. The reason the date was dropped for the looseleaves is that catalogers felt it was misleading to have a date in the call number when the title was being updated by filing pages. When a looseleaf publication is cataloged in the Cataloging in Publication program, they sometimes receive dates in call number. I would presume that the publisher did not tell LC that the publication is going to be a looseleaf. Since this is a deviation from normal call number practice for monographs, it is hard to remember.

Also, Jolande Goldberg has sent us the latest news on the implementation of KB:

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“After implementation of the 2 new schedules KBR (History of Canon law) and KBU (Law of the Roman Catholic Church. The Holy See) in Early Winter, the LC Law Team and the Rare Book Team in conjunction with the Law Classification Specialist and staff of the LC Law Library began reclassification of some of the most important collections in the

field of Canon law, not only to give the schedules a “trial run” but also to bring eminent source materials under bibliographic control. Targeted were early sources, including a broad range of incunabula (including Decretum Gratiani and decretal collections forming the Corpus iuris canonici), Rota Romana decisions, Bullaria and other principal sources of the

law, followed by decretists, decretalists and the later canonists. Since most of these works were in the pre-MARC file, all access points of a reclass record have been updated. “

As always, if you have any classification questions that you want answered in a column, email me. G



## The Open Archives Initiative

## The Internet

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Digital collections continue to grow in libraries, firms and other organizations. Whether locally developed documents, scanned collections, or other content, the next step in the evolution of these collections involves finding ways of linking them together to facilitate the effective dissemination, searching and preservation of content. That is a primary goal behind the Open Archives Initiative (OAI).

The OAI grew out of efforts in the sciences to develop e-print archives. These archives serve as a repository for scholarly papers. They began as informal ways of disseminating primary results and non-peer reviewed gray literature. A number of them have developed into essential mediums for sharing research results. The archives represent a shift away from the traditional paper based journal towards a faster and more economical method of publishing results. Established e-print archives exist in physics, economics, the health sciences, psychology and linguistics. As the size and importance of these archives has grown the need to search across and use them as a federated whole has become more and more important.

The OAI works to develop and promote interoperability standards to facilitate the efficient dissemination of content between and among these e-print archives. The fundamental

technological framework and standards developing to support this work exist independently of the type of content and promise to have much broader relevance in opening up access to a range of digital materials. The OAI enjoys a broad level of support from both the library and computer science communities. The initial meeting of the Initiative was held in Santa Fe, NM, in 1999 and was sponsored by the Council on Library and Information Resources (CLIR), the Digital Library Federation (DLF), the Scholarly Publishing and Academic Resources Coalition (SPARC), the Association of Research Libraries (ARL) and the Los Alamos National Laboratory.

The OAI divides archive participants into two camps: data providers and service providers. A data provider manages the e-print archive by providing systems for storing, submitting and accessing the works it contains. Typically a third party, a service provider creates applications to use or manipulate content stored in the archive. An example might be a search engine that could run queries across multiple collections using the metadata stored in each archive.

The current OAI technical infrastructure provides a method by which data providers make available metadata created to describe items in their archives. The current OAI descriptive

method makes use of an unqualified version of the Dublin Core metadata set. Mapping among multiple metadata formats would place a considerable burden on service providers who harvest the metadata and use it to build higher-level services. While research continues on creating a common search interface across heterogeneous metadata formats, the OAI's less burdensome and ultimately more deployable solution requires repositories to map to a simple and common metadata format. The fifteen elements comprising the Dublin Core have developed into just such a common standard for simple cross-discipline description.

The goal of interoperability in these archives resembles the use of Z39.50 in libraries. The OAI technical framework remains intentionally simple with an aim of providing a low barrier for participants. Designed with more complete functionality, protocols such as Z39.50 deal with session management and results sets and allow the specification of predicates that filter the records returned. However, this functionality comes at an increase in difficulty of implementation and cost. The OAI technical framework is not intended to replace other approaches but to provide an easy-to-implement and easy-to-deploy alternative for different constituencies or different purposes

than those addressed by existing interoperability solutions.

The system described by the OAI served as a model for the Legal Education Document Archive (LEDA). A repository on the web for law-related articles, working papers, theses, moot court briefs, and other legal academic documents offered by the Harvard Law School Library and Cornell's Legal Information Institute, LEDA makes materials available by their authors to facilitate research, collaboration, scholarship, and to provide an open publication forum for law students and faculty.

The project's manual states that:

From the point of view of a cataloger or librarian, LEDA is an archive system that collects electronic documents and associated, author-generated metadata in a way that permits a cataloger to review and perfect that data for subsequent use in bibliographic records and bibliographic searching.

From the point of view of the digital librarian, LEDA is a low cost way for individual institutions to build electronic collections that are then federated with the collections of other institutions.

From the point of view of a researcher, LEDA is a seamless collection of legal scholarship that can be searched either with fielded metadata or (soon) in full text.

LEDA consists of six subsystems:

1. A submission system to which authors or their agents may post documents for inclusion in the collection.
2. A metadata store, a database of bibliographic information about the documents in the system.
3. A document store, containing the original RTF documents as well as their HTML and PDF derivatives.
4. A review and approval system, used by LEDA site administrators and catalogers to review and approve data for posting, as well as perform other administrative functions
5. A search interface for bibliographic and (soon) full-text searching
6. A communications interface that allows a given LEDA server to be federated with others using the methods described by the Open Archives Initiative.

Libraries and other organizations creating repositories of digital legal information face the same question. How do we move what are essentially small, locally focused digital projects



**The Technical Services SIS, Online Bibliographic Services SIS, Research Instruction and Patron Services SIS, and Computing Services SIS**

request the honor of your presence at the  
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Saturday, July 14, 2001  
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1000 LaSalle Ave. (corner of 10th and LaSalle)

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into larger more production oriented mode? As applications such as the OAI gain in popularity, the roles that TS librarian can play in the management of digital libraries and in their transition from projects to production systems become more important and visible. Preserving, accessing and acquiring the material created and archived in this manner require long-term vision, commitment and a great deal of creative thinking. Inherent in each is the opportunity to rethink or reaffirm ways in which law libraries handle legal information.

**For More Information:**

The Open Archives Initiative (OAI) <<http://www.openarchives.org>>

The Open Archives Initiative Protocol for Metadata Harvesting <<http://www.openarchives.org/OAI/openarchivesprotocol.htm>>

The Legal Education Document Archive (LEDA) <<http://leda.law.cornell.edu/leda/>>

The Santa Fe Convention of the Open Archives Initiative / Herbert Van de Sompel & Carl Lagoze <<http://www.dlib.org/dlib/february00/vandesompel-oai/02vandesompel-oai.html>>

ArXiv.org hosted by Los Alamos National Laboratory <<http://arxiv.org/>>

RePEc (Research Papers in Economics) <<http://repec.org/>>

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# Miss Manager

*To contact Miss Manager, please  
write in care of the TSLLE Editors*

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Miss Manager,  
June 2001

*Dear Miss Manager:*

*I have gotten myself into a rather sticky situation. My very good friend from library school was hired to run another department in my library, partly based on my high recommendation. She has turned out to be a disaster. The terrific, interesting, driven person I knew 10 years ago is now a bitter, complaining troublemaker. The morale in her department is rock-bottom. The formerly wonderful relationship between her department and technical services is deteriorating by the minute. I feel foolish and I feel I have betrayed my colleagues. What can I do?*

*Sincerely,*

*In the Dog House*

Dear Dog House:

Since you cannot undo the actual hiring of this person, you have two options: 1) work to get the person fired; 2) work to improve this bad situation. You may have noticed that Miss Manager has given this kind of advice before, and that's because in any personnel problem those are the basic courses. The first one is extremely painful, usually bad for morale, often tangled up with legal difficulties, and hard to accomplish in many institutions. The second one is more typically the way to go, and therein lies all of the pain of managing people. How do you go about motivating an individual worker with a singular personality, filled with problems, complexities, desires, jealousies, pleasures, virtues, and vices all mixed into a formula unique to that particular piece of humanity? Your situation makes the attempt at this both more and less difficult. It is more difficult for you because you do not manage this person, and yet you seem to be blamable in some sense for the problems this person is creating. But it is easier for you because you can approach this colleague on a personal level which would probably be impossible for other people. So, you should make an appointment for lunch or an after work drink someplace away from the office. Be frank. Say that your own

department isn't interacting with your colleague's department in the same way it used to do, and, honestly, the people in her department don't seem very happy. Is there something wrong? Is there something you can do to help? If this doesn't actually open the floodgates, it should at least elicit a response that you can respond to. After this your next moves will have to be based on what she says. A none-of-your-damn-business response from her may require a clear statement that this problem will have to go to the director (or whoever the next person up in the organization may be) for resolution. A what-can-you-possibly-mean? response will indicate that she wants specifics, not generalities about vague dissatisfaction, so come prepared with the details that document your problem. A thank-goodness-I-can-talk-about-this response may be the most promising, but steel yourself against excuse-making, tirades against fellow workers, or the unexpectedly awful conditions of her new workplace. Someone who can be described as "a bitter, complaining troublemaker" sounds like a tough case to work with. But I have seen people like this make improvements once they have been informed that such was the impression they were giving. If you have any indication that those higher up the ladder have noticed with disapprobation the situation with your colleague, a hint along those lines should be given. But, at least as an initial approach, you need to tell her that there is a problem and that you are willing to work with her to resolve it. You will have to adjust your course after that depending on her behavior, but come back to it. Let her know that you are concerned and prepared to help her over whatever is causing her trouble.

*Dear Miss Manager:*

*I am having trouble getting all of my work done even though I have tried to streamline my workflow. I am not someone who avoids automating in order to become more efficient. I have a Palm Pilot, I do almost all of my communication via email or on my cell phone, I take my laptop and pager with me wherever I go, my meetings are all scheduled on a networked calendar, I can manipulate data with ease, but I seem to have more and more of it rushing in at me every minute. Back when I started, I was a cataloger and worked from 8 to 5 with an hour lunch. Now I get beeped at 5:00 a.m. and go until I collapse at midnight. How do you handle all of this influx. Gotta run,*

*Wired but mired*

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Dear Wired:

Why a manager working within a technical services area in a law library might feel the need to be quite as connected as you are is the question I find in all of this to precede the one you have asked. Don't get me wrong – I like a nice, high-tech gadget as much as the next geek; but I don't see that the existence of a particular gadget is reason enough to incorporate it into one's work life. No one will dispute the fact that word processing, email, and the web have all revolutionized the way we do our work. And it may be that 24/7 access to everything and everybody will prove to be just as necessary to our functions in the future. However, I would ask you to question whether or not you are doing less work by keeping more busy. Miss Manager has known a number of people who seem to be able to set up projects down to the smallest details and to the 15-minute increment, who are forever planning ways to move information from one place to another more efficiently, who are always at committee meetings working to create new methodologies or to implement them or to analyze them, who schedule every minute, who constantly rework the schedule when one of those minutes takes 75 seconds, who, in short, spend all of their time preparing to do substantive work that never actually seems to get done. And I don't mean the proper work of managers, the planning of work to be done by others when that is necessary, but the actual work that you, the individual manager, should be doing. Now I may have you all wrong, and in this I must admit to a prejudiced outlook. I just have trouble taking all of these overly-wired people seriously. In an airport several months ago (Miss Manager does not fly so frequently that she avoids people watching while waiting for planes) the opportunity of witnessing the contrasting styles of two business travelers presented itself. To the left was a person with a notepad (the paper kind) a pen (the ink kind) and a printed document that looked like a spreadsheet of terms and numbers. This person concentrated (wonderfully, I thought, considering the hubbub) occasionally making a check mark on the spreadsheet or a brief notation on the notepad, but clearly "poring over the data", as we used to say. To the right was another person. He at first seemed to be talking to himself, and this might explain why he alone occupied a five-seat section in the crowded area. He was in fact speaking into a hands-free cell phone which indeed seemed necessary since he was also manipulating a personal digital assistant and a pager. In a voice oblivious to the presence of other humans he was explaining to the person at the other end of the cell phone that the person at the other end of the pager was an incompetent boob and that the data concerning factory orders from his PDA contrasted with the information the pager person's predecessor had negotiated last week. He connected his PDA to a separate cell phone and then explained to some new person on the hands-free set that the latest figures from the Cleveland office "counterintuited" (would Miss Manager make up a word like that?) the figures from the Dallas office. And so on. So, it may be that Miss Manager's limited exposure has created an impression that

the number of electronic do-dads in use at one time is directly proportional to the self-important pretentiousness of the user, and so no objective analysis may be offered. In the parlance of the day, Miss Manager can most succinctly suggest that you improve your efficiency by getting a life.

*Dear Miss Manager:*

*Do you know the great hazard of working in a technical services job? Sitting! I sit at my desk 90% of the time. I sit in my car for almost an hour before and after work. Then I can't seem to get up the energy to do anything but sit when I get home. Is my job bad for my health? I've gained 20 pounds since I started here two years ago. Help!*

*Saddle Sore*

Dear Saddle:

Alas, Miss Manager can be of little help. Most jobs in the current economy available to people who have the kinds of skills we have will land us in chairs for most of the day. From a management perspective, there does not seem to be any great motivation for insisting on changes. I don't know if there is any evidence that svelte librarians do better work than their stockier colleagues. I expect that there is no correlation. Now, as a health matter, I think managers should be as encouraging as they can to keep workers in good shape. Healthy workers obviously take fewer sick days (or, let us say, have fewer legitimate chances to take sick days). Healthy people tend to be happier and more productive, and what manager wouldn't want to encourage that? But there can't be too much insistence here. Your health, including your weight, are your concern. Your workplace already plays a large enough role in your life. Don't allow it to intrude on every area. So, if you are really concerned about this, don't think of it as a problem that your job has created for you. That will teach you to look for a solution within the job, and that is probably not going to happen unless you plan on rearranging the microform room every couple of days. Change those parts of your lifestyle over which you do have some control. How you should go about doing that, what particular exercise program or which diet you should follow is not within Miss Manager's bailiwick. My only advice would be to avoid anything that says it won't be hard work. G





# OBS OCLC/WLN Committee

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## Annual Meeting - Minneapolis, Minnesota

It is time to be thinking ahead to the 2001 Annual Meeting in Minneapolis. As I write this, the meeting is still over 2 1/2 months away. However, the meeting schedule has been released and is available on the AALL website. The OCLC/WLN Committee's open discussion has been scheduled for Tuesday, July 17<sup>th</sup> from 7:30 to 8:45 AM. Susan Chinoransky has graciously agreed to offer one of her afghans as a door prize to someone attending the meeting. I speak from personal experience when I tell you how beautiful they are. I hope that many of you will be able to attend.

In planning the meeting, I welcome any comments and suggestions as to the topics that you would like to discuss. As is traditional, we will have an OCLC or affiliated-network representative at the meeting to talk and answer questions. One suggestion that I have already received is to possibly continue the discussion from the program on CORC from Monday morning ("Put a CORC In It: the Cooperative Online Resource Catalog's Attempt to Control the WWW Information Flow" - Monday, July 16<sup>th</sup>, 10:15 a.m.-11:45 a.m.). This program is probably my personal top pick as a "must attend" session. I hope that many of you will be able to attend as well, and that we are able to continue the discussion the next day at the OCLC/WLN committee meeting.

If you have any other topic you wish to discuss, please let me know. I hope to see many of you at the committee meeting on Tuesday morning.

## OCLC "Wish List"

On January 29<sup>th</sup>, a librarian at the Library of Congress, posted a message to the PCCList concerning an OCLC Wish List. He referred to the BIBCO-At-Large meeting at ALA Midwinter. I took a look at the Library of Congress website for BIBCO and it said that OCLC had announced that they were moving "to a relational database and were querying users about features they would like to see included in programming enhancements." The participants at the meeting discussed this and developed a wish list for both OCLC and RLG. The final list, in order of priority, was-

1. Authority validation (linked authorities).
2. Record distribution (record sharing between utilities)
3. Batch overlay (tape loading abilities that will overlay lower level records)
4. Online SACO record contribution to parallel NACO workflow including the ability to save SACO records in the utilities
5. Bibliographic file maintenance to be performed programmatically as much as possible
6. Numerical file sorting of series numbering
7. Import capabilities directly into the utility from remote databases
8. Online classification record contribution

What I found interesting in the ensuing discussion on the PCCList was most of the responses concerned online SACO contributions (#4). There was very little discussion of authority validation/linked authorities, which I think is the most significant (and was ranked number 1). One message pointed out the concern of name/uniform title

headings (100/240) and linked authorities. This would be a particular concern for law headings with all our jurisdiction name/Laws, etc. headings (110/240).

The other thing that I find interesting on this is OCLC's statement that they are moving "to a relational database." One thing about OCLC, they are not one to stand still—they are constantly on the move, evolving and changing. It makes being their customer and writing this column interesting.

## Other Developments

*Bits and Pieces*, OCLC's electronic newsletter had some interesting items over the past several months. The November issue had a long discussion about the new format LCCN's from the Library of Congress, which contain a 4-digit date. The most significant change to searching these in OCLC is the need to insert the hyphen in the command search (fin) with the index label (ln). The same requirement holds true when searching for authority records using the LCCN. In addition, since some LCCNs could now resemble ISSNs, OCLC will now require that the hyphen be dropped from ISSN searches when doing a numeric search. When using the index label (sn), the hyphen is optional.

In December, OCLC announced that they were discontinuing publication of the OCLC-MARC Code Lists in print and on the OCLC website. The main reason given for this is that it is available from the Library of Congress both in print and electronically, and that depository libraries currently receive printed copies from the Government Printing Office. Also in this issue there was a discussion of error reporting options for WorldCat

records. There are a number of ways to report errors, depending on whether or not proof is required. I personally like using the Web for errors that do not require proof. The other fast way is to include a 952 field in the bibliographic record describing the error. I would urge all of us to report errors, as this will result in a much cleaner database. The Web pages for bibliographic change is <http://www.oclc.org/oclc/forms/bibchg.htm> and the page for reporting duplicate records is <http://www.oclc.org/oclc/forms/bibdup.htm>

There is also a discussion of what libraries with full or higher levels of authorizations are allowed to change and replace, along with fields to add to enrich records.

Finally, I would like to mention an interview that Jay Jordan, president and CEO of OCLC gave to *Information Today*. It is available at <http://www.infotoday.com/it/dec00/hogan.htm> and is quite long. His discussion covers the entire range of OCLC products and services. It heartens me to see him state close to the end that for

OCLC, "the obvious integrator, the common denominator, if you will, is WorldCat." That gives me a special pride, because we have all had a hand in helping to create and maintain that database. He goes on to say that "I can promise you that you are going to see many more choices from OCLC in the future." It sounds like I will continue to have things to write about OCLC in the future.

I look forward to seeing many of you in Minneapolis! ☺



## Preservation

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A component of AALL's "Vision" as stated in its 2000-2005 Strategic Plan is that "AALL and its members advocate and work toward fair and equitable access to authentic current and historic legal information." One of the outcomes under Strategic Direction #4—"A Diverse Legal Publishing Industry Offers a Broad Range of Legal Publications in a Competitive Environment"—directly concerns preservation. This outcome states the following: "Historic legal materials are preserved and accessible." The Strategic Plan lists the following specific initiatives to be undertaken by AALL and its membership to bring about this outcome:

1. Develop a national plan for the preservation of legal materials in all formats.
2. Publicize current preservation activities.
3. Support efforts by libraries and publishers to build consortia for the preservation of historical electronic and print materials.

In a recent interview, Will Meredith, Preservation Librarian, Harvard Law School Library and Current Chair of the

TS/SIS Preservation Committee, discussed his plans and thoughts on how the Committee might work to implement these initiatives.

### ***What should be the components of a national plan for the preservation of legal materials?***

There are several basic things that we need for a successful preservation plan:

We need to identify the interested parties. Preservation is a huge problem, and no one library, company or organization has the resources to deal with the problem alone. In 1991, the Special Committee on the Preservation Needs of Law Libraries stated that the most likely group to coordinate the effort to preserve acidic legal materials would be the Law Library of Congress, and research law libraries, with the support of AALL. We need to reconsider this list. I would say that there were other groups that should have been included in a discussion of preservation efforts for printed legal materials. A successful plan will need to involve as many groups as possible.

Once the interested groups are identified, the plan could suggest

models for coordination and cooperation.

We also need to agree on what we mean by preservation. Resources will always be limited. What format or formats meet the needs of our users and at the same time fulfill the requirements for preservation?

We need a more accurate idea of the scope and nature of the problem. The 1991 report of the Special Committee proposed a project that would list which state and federal material had and had not been reformatted. Work was started on this but never completed. Ideally we should have a prioritized list of the work to be done.

### ***What steps does the TS/SIS Preservation Committee need to take to develop a national plan?***

The TS-SIS Committee is charged with writing a draft report by this summer, and having a final report ready by the summer of 2002. We're still at the committee discussion stage. The committee needs to review past efforts, and what has and has not worked. The next step will be writing a preliminary report. The committee will then invite suggestions, comments, and criticism

from the law library community. These will need to be reviewed and a final report written.

**What kinds of librarians need to be involved in this discussion?**

Anyone can be involved. Librarians from research libraries, archives, and state libraries should be involved. We also need to involve publishers.

**How should the Committee address the preservation of digital information?**

Right now, the committee is working with the AALL Special Committee on the Authentication and Preservation of Primary Source Materials in Law on some of the issues.

**What is the Committee doing now to implement Initiative #2 (Publicize current preservation activities)?**

One very effective way of publicizing activities and concerns in preservation is to sponsor educational programs at the annual meetings. It has also been suggested that there could be an on-line forum or discussion group for preservation issues. I would also like to find more effective ways to stay in touch with other committees at AALL.

\*\*\*\*\*

Any member of AALL who has thoughts on the preservation of legal materials are encouraged to contact

Will—or any of the members of the TS/SIS Preservation Committee.

2000/01 TS/SIS Preservation Committee:

- ◆ Will Meredith, Chair
- ◆ Hope Breeze (Duke)
- ◆ Kevin Butterfield (University of Illinois)
- ◆ Kate Pecarovich (UCLA)
- ◆ Hilary Seo (Georgetown)
- ◆ Lorna Tang (University of Chicago)
- ◆ Pat Turpening (University of Cincinnati)
- ◆ Sally Wambold (University of Richmond)



## Preservation Assessments

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The first step in a serious effort to preserve library collections should be a needs assessment survey. Although some surveys target specific collections, libraries that are beginning a preservation program, or enhancing an existing program, will want to conduct a general needs assessment survey. This general survey provides a foundation for developing a preservation plan and support for obtaining funds to preserve library collections.

The general needs assessment survey should cover all factors that affect the long-term preservation of collections. It will need to examine physical plant issues such as temperature and humidity controls, fire safety, lighting, pest control, housekeeping, and security. Collections should be examined and recommendations made for maintaining or improving their condition. All of the library's policies and practices that affect preservation should be evaluated, such as handling and use, food and drink policies, repair, and exhibition practices.

The survey should result in a detailed report that also includes a summary of the major improvements needed to ensure long-term preservation.

Although surveys can be conducted by in-house staff there are more advantages to using an outside consultant who can look at things with a fresh eye.<sup>1</sup> Several agencies provide this service, including Northeast Document Conservation Center <<http://www.nedcc.org/>>; Chicora, Inc. <<http://chicora.org/>>; and the OCLC-affiliated regional networks, AMIGOS <<http://www.amigos.org/>>, and SOLINET <<http://www.solinet.net/>>.

If your library wishes to hire a professional surveyor from outside the institution but cannot afford the expense, grant funding is an option. The National Endowment for the Humanities is one source of such grants. For the past two years NEH has offered preservation assistance grants up to \$5000 each for a specified list of preservation activities. General preservation assessments are one of the qualifying activities. Special consideration is given to applicants from jurisdictions that are deemed underserved by NEH. For the 2001 grant, fourteen states and Puerto Rico are considered underserved. To see the details about this grant go to <<http://www.neh.gov/grants/onebook/preservassist.html>>.

<sup>1</sup>For a further discussion, see Preservation of library & archival materials: a manual (section 1, leaflet 3: <<http://www.nedcc.org/plam3/leaf13.htm>>)



# Private Law Libraries

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One of my responsibilities as the Technical Services Librarian at Katten Muchin Zavis is to coordinate upgrades with the Information Systems Department. I could use some politically correct terms but what this means is that my PC is almost always in a testing mode. Once the problems are resolved, the rest of the Library PC's are upgraded. The appropriate fixes or patches are then loaded onto all the PCs. I have the satisfaction of knowing that the rest of the staff has a painless upgrade.

Sometimes this is not a problem. Several years ago when the firm migrated from a DOS environment to Windows 95 that was not the case. The support staff PCs were not going to be that difficult to upgrade because they were strictly DOS. The only difficulty that we had was the conversion of the cataloging staff's label making program to a Windows program. It took several weeks before the proper printer drivers were loaded. Each small step was treated with great enthusiasm that we were getting closer to the solution.

The main problem that caused the IS staff and me to become Siamese twins was the conversion of the Reference Librarians PCs. They were running DOS and Windows 3.1 programs. Their initial plan was just to transfer the files from the old PCs to the new ones. We quickly learned that Windows would not copy over as is. I had the satisfaction of

having suggested that was a possibility. We had to install each and every package. After each installation, there was testing to determine whether there were conflicts with other packages already installed. When they fixed one, another one produced error messages. I became proficient in using the Paint Box for printing out the messages with each instance.

Since we also have branch offices, we had to develop instructions for the local IS staff, so they were not having to develop the same solutions that Chicago had already developed. What turned out to be interesting was that they had completely different problems.

The problem that caused a lengthy resolution was printing DOS products to the network printers now running in a Windows environment. The locking up of the PC was frustrating because it would mainly happen when I was trying to do something in a hurry. Based on these experiences, I created **Roeske's Rules for PC's**.

Rule #1: Never let your computer sense that you are in a rush. It immediately causes system problems.

Rule #2: Keep your sense of humor. Even if no one else understands your brand of humor do whatever to preserve your sanity.

Rule #3: If no one complains after the stress time is over, you can pat yourself

on your back for a job well done. No one will say anything to you when everything is working okay. But you will hear from them, if they have problems. Then your job continues.

Rule #4: Discover the vices of your IS staff. If it is homemade brownies, Fannie May candy, or whatever, feed that vice. They will keep coming back until they resolve the situation.

Rule #5: Encourage the IS staff to admit they cannot easily resolve the problem. Make it clear that it is not a reflection of their abilities if they have to ask for assistance. It is better than wasting both your time and their time. Dragging out the conversion timeframe is not acceptable. If this can be prevented by using consultants or other personnel with the expertise in the area, do it.

Rule #6: Remember to congratulate and compliment them to their supervisors afterwards. They rarely hear success stories but they certainly know about complaints.

Rule #7: Even though it is easy to verify what version of a Windows product you are running, maintain a paper copy as well. Murphy's law decrees that when your PC is busy processing, you will get a call wanting to know the version number.

If anyone else has a list of rules, please let me know. They can be for future articles. ☺





# Research & Publications

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## Research, Publications & PEZ

No. This column will not shrivel up and die. It's not going to slowly fade away from the pages of all the great useful stuff that's packed into each issue of TSLL. Research and publications in technical services law librarianship will not take a break. No. We're going to "press on" – old publishing joke.

Many thanks are in order to LeGrande Fletcher and Rebecca Lutkenhaus who have contributed in many substantial ways, both directly and indirectly to getting this column published the past couple of years. Read the back issues of TSLL for a lot of fabulous ideas for your research and publishing needs. It's all there.

So I'm back to writing this column. Now I **\*\*KNOW\*\*** that you colleagues are reading this column because you tell me so when we meet each other in the halls of the AALL annual meetings. You tell me how much you enjoy my columns. Some, during the OBS/TS Research Roundtable meeting at the AALL annual meetings, also tell me that you read and glean some goodies from the TSLL Research and Publications column.

I found myself getting in the SCOPE (Strategic Committee On Planning Environmental Scans) of things like so many AALL SIS's are doing nowadays. A lot of hard work is going into strategic planning and environment scans of our sub-organization units of our profession. Oh, I made up the acronym "SCOPE." It just sounded cool. What does SCOPE have to do with this column you wonder? It's

going to be sort of pen-and-paper "mouthwash" of where we need to go with Research and Publications column. This is where you come in. I need your input. I need your ideas. I need your comments. Let me help us get started with what kinds of information you want from future columns. This is NOT ASURVEY!

Here's what you do. You get this June 2001 TSLL issue on the web <<http://www.aallnet.org/sis/tssis/tsll/tsll.htm>> - if that's too much to write down, then just go to Yahoo.com and do a search "tsll". Once you have the issue pulled up, find this column. You then highlight the questions below, use the "copy" feature on your browser and drag the mouse down to the end. You go to the "edit" portion of your toolbar and press copy. Then you get into your e-mail program. You make a new "memo" and get into the toolbar on your e-mail program and press "paste." Hah! You're then ready to tell me numerically what priorities you want me to work on for future TSLL columns. Slick huh? This is NOT A SURVEY! So, start your highlighting with this next line.

FROM: [You type your name here] after you pasted the PEZ in the body of your e-mail.

TO: BRIAN STRIMAN, Column Editor, TSLL Research & Publications column.

RE: My priorities for you to consider are below. I've just given you numbers as you preferred, with the number 1 being the top priority, and descending numbers to be less priority. I've written comments at the end of the PEZ (Priority Enumeration Zone).

PRIORITY ENUMERATION ZONE:

#\_\_ Keep the column the way it's been, with a wide variety of stuff about research and publications.

#\_\_ Change the focus of the column to concentrate the next several issues on the PROCESS of research for a more substantial article to publish in a scholarly refereed journal.

#\_\_ Change the focus of the column to concentrate on real good ideas of things I could consider writing about for smaller publication articles for newsletters.

#\_\_ Get more serious with the column's tone. Get me solid info I can build upon to get me off the ground and beginning to write.

#\_\_ Educate me on all the publishing options out there. Include detailed glossary of publishing terminology, like "what is a refereed journal?" Or, where all can I go to find out publishers and their guidelines for getting something published? Stuff like that I want.

#\_\_ Make the column fun to read, forget good content. I just want to smile and laugh mostly when I read it. Put in some funny research and/or publishing jokes. These jokes can also be useful at research and publishing parties at which I am often invited.

\_\_\_\_ Comments for Brian:

[End of PEZ. Stop highlighting here. Go to the edit toolbar and click at "copy" then pull up your e-mail and "paste" it inside the body of the message. Then fill it in, and e-mail it to: [bstriman@unl.edu](mailto:bstriman@unl.edu)]

If you hate technology (and \*who\* doesn't?), you can take this issue right now to the nearest copier and photocopy the page/s with the PEZ noting that this is NOT A SURVEY!! Then using a hand-held writing instrument, fill in the blanks with your enumeration, then get an envelope and

mail it off to me. Brian Striman/Schmid Law Library/University of Nebraska College of Law/P.O. Box 830902/ Lincoln NE 68583-0902.

Fabulous. That was kind of fun wasn't it?? Sure it was! Okay, next let's talk about the July 2001 OBS/TS Research Roundtable. I need ideas for an agenda. One idea I have already is that I plan on attending an educational program for the April 2001 SEAALL/SWALL annual meeting titled "Getting Published." I can take copious notes and get handouts and get permission from the speaker to use some/all of his/her ideas (which copyright permission, etc.) for our Roundtable in Minneapolis. What do you think about that publishing fans? I also thought I could bring a video to watch. The video is produced by PublishNow Bootcamp Enterprises, and is titled "No Problem Publishing – No Problem Perishing." Something like that. You probably never thought of

publishing as a bootcamp experience, eh? Well getting yourself sat down in front of your PC to whip up an outline of what you want in your article or book may be as challenging as being in a bootcamp situation. Maybe the bootcamp looks better to you now that you're faced with a blank computer screen and a few ideas in your head.

It's okay. I know how difficult it is to take time out for professional stuff like writing and doing research so you can crank out an article or book. So, talk to me. Communicate with me. What should be the focus of future columns? If you don't communicate with me, then I'm going to do whatever I want. Then if you complain, I'll make a horrid face and begin drooling a lot. That's not a pretty sight. Trust me.

Lastly, congratulations to our colleagues on their recently published articles!

"Cataloging @ 2000: Over 100 Years of Change at The University of Colorado Law Library" by Georgia Briscoe and Karen Selden (both from U. of Colorado).

"Information Resource Management: Transitions and Trends in an Academic Law Library" by Eloise M. Vondruska (Associate Director for Bibliographic Services, Northwestern U.).

Check these out in volume 30, numbers 2/3 of *Cataloging & Classification Quarterly*. The issue is entitled "Managing Cataloging and the Organization of Information: Philosophies, Practices and Challenges at the Onset of the 21st Century. Part II: Specialized and Academic Libraries in the United States."

If any of you readers of this column have published recently, please let me know and I'll include you and your work in future columns. ☺



## Serial Issues

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### What's New in Z39.71-1999?

*Holdings Standards for Bibliographic Items, Z39.71-1999*, was published last year. What changes will result for serials holdings statements? How is 71 different from its predecessors Z39.44 for serials and Z39.57 for non-serials?

#### History:

The first United States holdings standard *Z39.42-1980 American National Standard for Serial Holdings Statements at the Summary Level* was developed in the late '70s. The committee that drafted 42 collected boxes and boxes of printed serials union lists and, based on common practice in those lists, derived principles of what had generally worked well. The aim of 42 was to guide ILL borrowers, not to provide full inventory control of local serials. Users of OCLC's new interlibrary loan module felt the need to know more for a serial than its location — they needed to

know which parts of the serial were held. When OCLC implemented Z39.42 in early 1980, it became, for an ANSI/NISO standard, a bestseller!

42 defined holdings standards for serials at the volume level as "summary holdings" (Level 3). It also allowed a holdings statement with minimal information: the optional Level 2 statement provided no volume information, only coded hints about roughly how much you held, whether you were still receiving the title, and whether you kept all or a limited part of what you received.

*Z39.44-1986, Serial Holdings Statements*, responded to the need for fully enumerated holdings, and defined both summary level (Level 3) and detailed level (Level 4) holdings for serials. OCLC union listing still allowed only summary-level holdings statements and eventually implemented Z39.44. Automated checkin systems and online public ac-

cess catalogs were appearing; several systems used Z39.44. A few years later, *Z39.57-1989, Holdings Statements for Non-serial Items*, was approved. In approach, it resembled 44, but to treat non-serial extent-of-holdings, it developed new categories: Name of Unit and Extent of Unit.

Because NISO standards must be reviewed after five years, in 1991 NISO commissioned a draft of a holdings standard to replace both 44 and 57, *Proposed American National Standard Holdings Statements for Bibliographic Items, Z39.71-199X*. It was voted on by the NISO community but was not approved. In 1994, a committee was appointed to look at the 1991 draft, and to resolve the problems identified in the 1991 ballot. Soon after they began their work, the international standard for serial and non-serial holdings at the summary level, *ISO 10324, Holdings statements — Summary Level*, became available. Since

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NISO encourages compatibility with relevant international standards, the committee started a new draft of Z39.71 based on ISO 10324, adding rules for detailed-level holdings.

### Scope of Z39.71-1999:

According to the abstract at the beginning of 71, it covers the following:

It defines *display requirements* — how a holdings statement should look.

It defines display requirements for *holdings statements* which indicate what is held in your library, or in a shared collection of a group of libraries. It can be used in a regional union list or in your local catalog.

It defines display requirements for holdings statements for *bibliographic items* — anything which you can describe bibliographically, by cataloging rules.

It defines display requirements for holdings statements for bibliographic items in *any physical or electronic medium*. This includes electronic resources. These were not included in past standards which covered only entities in “any physical medium” (57) or “serials in all physical forms” (44).

It covers *electronic resources . . . under [an institution’s] control or available under other arrangements*. “Under an institution’s control” means resources in your library — a CD-ROM in the back of a book, or a CD-ROM or database file on a local server. “Available under other arrangements” further encompasses any file on a remote server, reached through the Internet or other means, including aggregators’ collections of e-journals. This is obviously a concept new in 71. In the mid-1980s, electronic databases were far less important to library collections than they are today, and were more separate — few libraries tried to include them in catalogs. Only recently, with full-text journal databases that resemble and may substitute for printed journals, have we felt a strong need to show holdings for electronic databases.

It can be used for *both manual and automated means of recording holdings*, ranging from a handwritten or typed list to a database, perhaps formatted with MARC tags, in a computer.

The committee that wrote 71 was very aware of the number of holdings statements already in existence: more than seven million union listing holdings statements in OCLC and an unknown quantity in other regional lists and in local catalogs. It was important to keep those statements valid and usable, while establishing rules for new developments. Therefore, much of 71 is similar to its predecessors, and holdings statements created under earlier Z39 standards remain valid.

### Changes to Terminology:

Z39.71 defines roughly the same six data areas as its predecessors, some with different names. The holdings statement must be linked to an **Item Identification Area**. This more general term comes from Z39.57; 42 and 44 holdings statements were linked to a “Serials Identification Area.”

The area for coded or textual holdings information is now called the **General Holdings Area**. This term is closest to the term used in 42 and reflects the intention to provide general data about holdings. 44 and 57 called it “Status Data Area.”

The note area, formerly called “Local Notes” now has a broader term: **Holdings Note Area**, since all holding information is local.

### Changes to Data Elements:

The **General Holdings Area** is now optional; it had always been required in the past. Looking back at the OCLC union listing experience, the committee recognized that many interlibrary loan users did not understand the coded data, and that many groups chose the option to suppress the coded data in printed lists. Back in 1980, the General Holdings Data Area of 42 was intended to provide hints about how much was held in a Level 2 statement which didn’t provide specific volume or year information. Over the years, it was found

that most OCLC union list holdings statements *did* include volume/year information, so that the coded hints of Level 2 weren’t needed. When the standard is used in a local system, volume/year information will almost always be present.

If you still use the General Holdings Area, some of its codes have changed. 44 and 57 distinguished between summary and detailed holdings statements. Type of Unit Designator in 71 no longer makes that distinction because “summary/detailed” isn’t very meaningful for non-serial titles. If a computer system needs to know, the MARC Format distinguishes summary from detailed level. Instead, 71 uses those same Type of Unit Designator codes to distinguish the Basic Bibliographic Unit from a Secondary Bibliographic Unit such as a supplement or an index. This distinction may be useful to law libraries.

The **Physical Form Designator** in 71 now uses all the codes defined for the MARC Bibliographic Format 007 first two positions, rather than just some of them. This increases the number of formats you can identify. Since the MARC Bibliographic Format adds new formats when they develop, holdings statements will automatically be able to identify new formats without needing to change the standard.

The **Acquisitions Status Designator** successfully combines the serial and non-serial values of 44 and 57; the values don’t clash.

One change to the **Retention Designator** brings the terminology up to date: “retained until replaced by microform” is now “retained until replaced by microform, or other preservation format.”

The **Extent of Holdings Area** merged the serial and non-serial categories. In addition to Enumeration and Chronology, you now can use Extent of Unit [5 microfiches], Name of Unit [“Appendix” or “Charter” chap.1-74] and a Specific Extent Note in angle brackets [“Decisions” 1 v. <in binder>].

**Captions**, such as volume, Band, part, number, side (for a long-playing record), are “recommended but optional” in 71. In 42, they were forbidden, in 44 they

were required in a detailed Level 4 statement, and required if available in a summary Level 3 statement. In 44, captions were to be repeated at both ends of a range [v.5-v.22]. In 71, it is now optional to repeat the caption at the end of the range [v.5-22]. However, in an itemized statement that records each unit, the caption is to be recorded before each unit [v.1 v.1A v.1B v.2 v.2A v.3]. New in 71, captions may be translated. 71 explains what to do with redundant captions such as bulletin no. 25, which may be recorded as bull. no.25, but optionally as bull.25 or no.25. This will work better with most automated check-in systems that don't have room for such long captions.

A **non-gap break** is a break in numbering or chronology "caused by unpublished parts or discontinuity in the publisher's sequential designations," and indicated by a semicolon. A semicolon can be used to indicate a change or other peculiarity in the method of numbering [no.1-no.8;v.3:no.1- ]. It was very important in 42 when captions were forbidden, but is less necessary when you can record captions. In 71, it is now optional to report a non-gap break.

71 allows two styles, without preference, of display of Enumeration and Chronology: **separate** [v.1-8 1990-1998] and **adjacent** [v.1(1990)-v.8(1998)]. 42 allowed only the separate style. 44 allowed both separate and adjacent styles for summary level statements, but required the adjacent style for detailed statements. In calling the adjacent style "Option A," 44 seemed to prefer it. Although 57 is the non-serial standard, it has instructions for enumeration in serial secondary bibliographic units (for example, an annual supplement to a monograph). Like 44, 57 allowed adjacent or separate styles for summary holdings statements, but required the adjacent style for its detailed statements.

Our automated systems may force you to use the separate style. At the present time, if you are fully coding holdings statements in the MARC Format, you must use the separate style because the 863/4/5 tags do not allow you to repeat enumeration or chronology subfields. You can code an adjacent holdings

statement in the free-text MARC Textual Holdings 866/7/8 field.

Chronology, when displayed separately in 42 and 44, was not surrounded by **parentheses**, although the adjacent display used parentheses. 71 allows parentheses to surround chronology in a separate display. You, your consortium, or your system can decide whether or not to use parentheses to identify chronology.

New in 71 is the **mixed-level holdings statement**, which allows you to code part of the run of a serial at summary Level 3, and part at detailed Level 4. This facilitates conversion of older manual holdings records, which may not have enough information for a detailed holdings statement. You can then start to record the current or recent volume at detailed Level 4, perhaps automatically updated by a serials check-in system.

71 allows an **open detailed Level 4 holdings statement**, which allows an easily-understood compressed holdings statement that doesn't require maintenance. [v.5:no.1(1986:Jan.)- ]. In 44, only summary Level 3 statements could be open; it seemed to have been assumed that a detailed Level 4 statement would be closed, kept current by an automatic check-in system. This was harder to do than expected, and is only now becoming fairly prevalent.

In 71, **new series** is to be recorded as new ser. rather than n.s., and it is to be separated from the next level caption by a colon [new ser.:v.1:no.1]. The longer abbreviation brings it into compliance with AACR2's Appendix B. The use of the colon and the longer abbreviation may be difficult to implement in some online check-in systems.


71 clarifies the use of **punctuation** which appears on a volume and is also part of the standard's punctuation scheme. One example is the hyphen, which represents a range of volumes in a compressed holdings statement, but may also appear as enumeration such as title 24:section 1-1 to section 16-1613. 71 allows you to use the hyphen in the middle of such enumeration and also allows the use of "to" if it clarifies the holdings statement.

In 44, you were required to record **alternate numbering** [v.1-v.3=no.1-no.36]. It is optional in 71 to record an alternate numbering scheme. The MARC format does allow coding of alternate numbering, but some check-in systems may not allow it at this time.

Alphabetic characters in enumeration [v.34B [beta]] were to be romanized in 44 and 57. Looking forward to future developments in coding non-roman alphabets in library systems, 71 makes **romanization** optional.

Some titles are published with **non-Gregorian dates** (calendars other than the one we generally use in the United States). Both 71 and 44 require you, in summary Level 3 statements, to convert the dates to recognizable Gregorian years. New in 71 is the ability to record the non-Gregorian date — if it can be only one of two Gregorian dates — as "5757 [1996 or 1997]," rather than with a question mark. In 44 we would have recorded 5757 as "199?" which was less exact.

What about **multiple versions**? Where do you put holdings for a microform version of a journal, or an electronic journal? The standard's rules haven't changed, but cataloging rules are beginning to affect this. We are told very clearly in 71: "This standard allows for the inclusion of information about bibliographic items in different physical and/or electronic media within a single holdings statement when only one applicable item identifier exists (for example, because only a single bibliographic record was created.)" "Separate holdings statements are required when materials are described in two or more bibliographic records." AACR2R still requires separate bibliographic records for microforms and print serials. But the 1996 "CONSER Single Record Option" for online serials allows you to use one bibliographic record for a serial in both print and electronic formats. If you have one bibliographic record, you have one item identifier, and you can have one holdings statement for both formats. In practice, you may want to create two holdings statements attached to one bibliographic record.

Note: Ellen Rappaport was co-chair of NISO Standards Committee SC AL which developed Z39.71-1999. 



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## Serials

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The following serial title changes were recently identified by the University of San Diego Legal Research Center serials staff and the University of California, Berkeley Law Library cataloging staff:

*Directory of legal services programs in California*

1990/91-1994-1995  
(OCoLC22392823)

**Changed to:**

*California legal services directory*  
2000-2001-  
(OCLC45427684)

*Family and conciliation courts review*  
Vol. 27, no. 1 (July 1989)-v. 38, no. 4 (Oct. 2000)

(OCoLC20487112)

**Changed to:**

*Family court review*  
Vol. 39, no. 4 (Jan. 2001)-  
(OCoLC44806798)

*Federal estate and gift taxes explained*  
-1999

(OCoLC1799895)

**Changed to:**

*U.S. master estate and gift tax guide*  
2001-  
(OCoLC45644507)

*GP solo & small firm lawyer*

Vol. 15, no. 3 (July/Aug. 1998)-v. 16, no. 8 (Dec. 1999)

(OCoLC39397961)

**Changed to:**

*GP solo*  
Vol. 17, no. 1 (Jan./Feb. 2000)-  
(OCoLC43462627)

*The Immigration Act of 1990 handbook*

[1991 ed.]-1999-2000 ed.  
(OCoLC26733852)

**Changed to:**

*The Immigration Act of 1990 today*  
2000-2001 ed.-  
(OCoLC45214511)

*Journal of ethics, law & aging*

Vol. 1, no. 1 (spring/summer 1995)-v. 5, no. 2 (fall/winter 1999)  
(OCoLC33823585)

**Changed to:**

*Ethics, law and aging review*  
Vol. 6 (2000)-  
(OCoLC44854442)

*Journal of proprietary rights*

Vol. 1, no. 1 (Dec. 1988)-v. 12, no. 9 (Sept. 2000)  
(OCoLC18757754)

**Changed to:**

*Intellectual property & technology law journal*  
Vol. 12, no. 10 (Oct. 2000)-  
(OCoLC45622574)

*Mexico business monthly*

Vol. 1, no. 1 (Feb. 1991)-v. 9, no. 12 (Jan. 2000)

(OCoLC22806710)

**With Feb. 2000 issue, absorbed by:**

*Latin American monitor. Mexico*  
(OCoLC27671491)

*The Parker School journal of East European law*

Vol. 1, no. 1 (1994)-v. 5, no. 4 (1998)  
(OCoLC29883041)

**Changed to:**

*The journal of East European law*  
Vol. 6, no. 1 (1999)-  
(OCoLC44495971)

In the "I wish they'd make up their minds" department:

*Suffolk University journal of trial & appellate advocacy*  
Vol. 4 (1999)

(OCoLC43796865)

After one issue, **returned to former title:**

*Suffolk journal of trial & appellate advocacy* (2000)

Vol. 5 (2000)-

(OCoLC45241705)

*Ulrich's international periodicals directory*

11th ed. (1965)-38th ed. (2000)  
(OCoLC2521849)

**Changed to:**

*Ulrich's periodicals directory*  
39th ed. (2001)-  
(OCoLC45213211)

*Update on law-related education*

Vol. 1, no. 1 (spring 1977)-v. 23, no. 2 (winter 1999/2000)  
(OCoLC3023254)

**Changed to:**

*Insights on law & society*  
Vol. 1, no. 1 (fall 2000)-  
(OCoLC44815455)

The following serial cessations were identified by the University of San Diego Legal Research Center serials staff and the University of California, Berkeley Law Library acquisitions staff:

*CDF reports*

**Ceased with:** v. 20, no. 6-7 (June/July 1999)

Replaced by information on web site:  
<http://www.childrensdefense.org>  
(OCoLC7389354)

*Hofstra environmental law digest*

**Ceased with:** v. 10, no. 2 (spring 1996)  
(OCoLC11520073)

*Youth law news*

**Publication suspended with** v. 21, no. 2-3 (Mar.-June 2000)  
(OCoLC10525368)



# Subject Headings

## Getting Lost: Great Britain and Extinct Jurisdictions

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Unlike the United States with its centuries of political stability, much of the world has undergone very substantial changes in boundaries. Often the basis of a country's legal system is the legal system of a previous and no longer existent jurisdiction (typically an empire of some sorts). While a name change is very simple to deal with (LCSH uses the latest form of name, unlike descriptive cataloging which uses the name at the time of publication), LCSH has a problem when it isn't clear if the jurisdiction merely changed name or ceased to exist.

A simple change, e.g., "Siam" becoming "Thailand" is no problem since they clearly refer to the same country. Similarly, the breakup of the Roman Empire (even though some of its agencies still function) is a no-brainer (though from a legal perspective the distinction made between the Byzantine and Roman Empires is questionable since from their legal perspective they were one jurisdiction, which unfortunately lost many of its western provinces). There have been some situations where ambiguity over whether a jurisdiction is "extinct" or has merely changed its name leads to policies that result in headings that make many users think that catalogers have no brains, e.g., the former infamous and unmourned heading: *Soviet Union—Foreign Relations—Byzantine Empire*. Potentially the most serious problem is self-inflicted: "since the memory of law catalogers runneth not to the contrary" we have insisted that "Great Britain" and "England" were one and the same, which they never were (no matter how much some Anglophiles thought they were)-- in effect we decided that England became extinct in 1707, ignoring that there will always be an England not to mention that there really still is a Scotland.

### Extinct Jurisdictions

Many "extinct" jurisdictions were empires who left a significant legal legacy affecting the legal systems of diverse countries that might not be considered as being at all connected by contemporary standards. The law of the "Holy Roman Empire" (not holy, not Roman, not an Empire - but a jurisdiction of critical significance in understanding the evolution of European law) is "extinct" meaning that it is still a valid subject heading. Other extinct jurisdictions (meaning valid subject headings) include Rome, Byzantine Empire and Russia (for the Czarist Empire, reversing the annoying practice of claiming the Soviet Union was the same country with a different name leading to many headings that sounded absurd). Anyone researching a country whose legal system was influenced or derived from an extinct jurisdiction should know to check the ancestral system (thus Roman law is important whether you live in Louisiana, Scotland, South Africa, or Chile, even though you won't be especially interested in all work with a subject subdivision for Italy).

If CPSO decides that a jurisdiction is "extinct," then the heading remains available for subject catalogers. If on the other hand a jurisdiction is considered to have changed its name, the subject heading will be the current form of name (e.g., Rhodesia, see Zimbabwe) as reflected in a note on the name authority record. The problem arises when CPSO claims a jurisdiction has merely changed its name, but there have been more fundamental changes.

A jurisdiction which everyone except LC thinks is extinct is the Ottoman Empire. LC treats it as an earlier name of the modern Republic of Turkey. While this may be true from the perspective of Turkish historians, it isn't true for

lawyers. The Ottoman Empire is the basis of the legal system of most of the Middle East including such diverse countries as Algeria, Bosnia, Egypt, Iraq and Israel. Thus a study of Ottoman notary practice in Haifa in the 17th century may end up with a geographic subject heading for "Israel" and/or "Turkey," hopefully with a history heading with a century included (which isn't possible in all cases). Nothing in the heading string will tie it with other works on Ottoman law. One might "cheat" and throw in a heading for "Turkey--History--Ottoman Empire, 1288-1918" but that isn't really "legal" according to the subject cataloging manual. One might propose a heading such as "Law--Turkey--History, 1288--1918" or "Ottoman law" but that would be a deviation from current policy (albeit a user-friendly deviation), especially if it were authorized to be a "second heading" or qualifier for works entered under the standard heading with the 20<sup>th</sup> century jurisdiction (e.g. Turkey, Yugoslavia, Israel or some other country that didn't exist in the 17<sup>th</sup> century).

Some other arguably extinct jurisdictions that are alive and well in LCSH include British India (the "Raj", broken up in 1947) which LCSH insists is the same as the current Republic of India, or the Austrian Empire (deceased in 1918) which was a lot larger than modern Austria, but under LCSH no easy distinction is made. If one is studying Pakistani law, one is not especially interested in the law of post-1947 India, but is very interested in the the law of pre-1947 imperial India. Using subject headings it is a problem, especially for 20<sup>th</sup> century materials (LCSH doesn't allow country-specific periods to be free-floating under topics, so we can't construct a heading such as "Contracts --India--History--To 1947" ). Another solution would be to regard British


India as having gone extinct in 1947, rather than the current policy of it having undergone a minor name change and major territory loss. In that case the geographic subheading for imperial India would be different from those of post-independence India.

### Great Britain

A similar problem, even if it hasn't become an extinct jurisdiction (yet) is "Great Britain". The law community, reflecting a bias that annoys the non-English British, has insisted on using "Great Britain" for books on the law of England. In effect, law cataloging practice has been to regard "England" as if it changed its name to "Great Britain" in 1707 when it annexed Scotland. Especially as pertains to law, Scotland and England have always existed as separate countries with distinct legal system even though they agreed to a common parliament and in

certain cases a common court of last resort, and even though the political reality is that England dominated and many Englishmen regarded Scotland as a mere province rather than as an equal partner. However under any theory of Anglo-Scottish relations, it was totally wrong for the law community to use "Great Britain" for law applicable to all of the United Kingdom as well as law applicable only to England. We goofed.

Under law subject practice there is no way to distinguish between a law book applicable to all of Great Britain or one limited to England. This has always violated LCSH which requires making the distinction, but it is a distinction often overlooked by American and English catalogers (note: I didn't say "British" – Welsh and Scottish catalogers rarely make that mistake). At present we can not distinguish between law books applicable to all of Great

Britain, and those applicable only to England. Whereas the usual problem with extinct jurisdictions is general subject cataloging policies that have undesirable impact when applied to legal materials, the decision to use "Great Britain" for books on English law is a dumb idea that originated in and is limited to the law community. Even though it would probably require a massive cooperative effort to correct the bibliographic records, we should undertake to stop using "Great Britain" for the law of England, and to change the existing bibliographic records. Even if "Great Britain" survives as a jurisdiction (as opposed to reverting to two separate kingdoms with a common monarch - the least traumatic form of Scottish independence being advocated) we need to distinguish between books applicable to all of Britain as opposed to only England. 

(Continued from page 1)

need is your user name and password. We [*Classification Web's* Product Support staff] maintain and update both the software and the data, and can have these changes "in your hands" instantaneously.

Indeed, the *Classification Web* site is updated with the latest Library of Congress bibliographic, classification, and subject data once a week, eliminating the wait for production and shipment of updated volumes, loose-leaf pages, or CD-ROMs.

*Classification Web* also offers catalogers a wonderful array of useful features, including:

- ◆ Browse and search screens that allow users to create simple or complex Boolean searches using captions, index terms, or keywords;
- ◆ An enhanced browser function that combines table and schedule data to display fully calculated classification numbers;
- ◆ A hierarchy browser that allows browsing of the schedules at any

level, from the most general to the most specific;

- ◆ Notes functions that allow users to write and save personalized notes and hotlinks at any location in any of the classification schedules;
- ◆ Correlations between subject headings and classification numbers or vice-versa; and
- ◆ Access to Library of Congress subject authority records.

### Getting Started

*Classification Web* provides a self-paced "Quick Start Tutorial" for users. The eight sections thoroughly introduce the user to the product and its special features. The tutorial is clearly written and thoroughly illustrated by clear screen shots of the functions and features that are described. Because of the number and variety of features found in *Classification Web*, using the tutorial is essential for those who wish to use it most efficiently and effectively. However, even though the tutorial is thorough, each section is concise, so completing the entire tutorial took me less than one hour.

In addition to the tutorial, an extensive, context-sensitive help system is available from each screen of *Classification Web*. Like the tutorial, these help pages are thorough and easy to use and understand. Finally, a *Classification Web* e-mail discussion list exists. The volume of traffic ebbs and flows on this list, but is certainly is not overwhelming. However, *Classification Web's* Product Support staff is quite responsive to ideas or problems that surface on the list, so subscribing to the list is worthwhile.

### Four Functions

The *Classification Web* menu gives access to the following four functions:

1. Browse the Library of Congress classification schedules;
2. Search the classification schedules;
3. Search or browse the Library of Congress subject headings; and
4. Find subject heading and classification number correlations.

I will briefly discuss each function below.



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Nearly all of the classification schedules are available in *Classification Web*. Because the *Classification Web* schedules are updated weekly, they are the most up-to-date version of the Library of Congress classification schedules. Users may choose to **browse the classification schedules** for a specific classification number (for example, KF3775) or they may browse within a specific schedule (K), a specific subclass (KF), or even a specific table (KF6).

*Classification Web* allows users to choose how to view the results of these classification schedule browse searches. The Enhanced Browser is one of my favorite features of *Classification Web*. This browser setting automatically combines schedule and table numbers to generate a display of fully calculated classification numbers together with their corresponding captions. Because I set my preferences to automatically use this feature, I no longer use tables to calculate numbers myself — a wonderful time (and aggravation) saver! The one caveat to relying on this feature is that the schedules contain some situations where normal table provisions do not apply (think of those times you have seen a table reference in a paper version of the schedules, followed by the word “modified”). Luckily, the Library of Congress is working to either eliminate some of these exceptions or provide alternative solutions, such as providing full breakdowns directly in the schedules in situations where normal table provisions do not apply. Until these changes are made, however, *Classification Web* identifies these potentially problematic classification numbers and their captions by displaying them on a yellow background, indicating the need for caution in their use.

The Hierarchy Browser feature displays a linearly-arranged outline of the entire classification schedule being browsed. This display appears in a small frame above the browse result screen. Because each caption in this hierarchical outline is hotlinked, a succession of clicks will display a more specific breakdown of that particular

schedule. Because I like to know where I am within a schedule’s hierarchy, I set my preferences to automatically show me this information each time I browse the classification schedules.

The second function on *Classification Web*’s menu is the “**Classification Search**.” This feature is the electronic equivalent of the indexes found in paper versions of the schedules, but because of the powerful search options available, it is much more effective. The tutorial provides details of the most effective search strategies to use.

The third function allows one to **search or browse the complete Library of Congress subject headings**. These headings can be browsed alphabetically or searched, using powerful search options similar to those used in a classification search. Although access to the *Library of Congress Subject Headings* is important to catalogers, I failed to anticipate this tool’s usefulness at the reference desk. One afternoon, a patron explained to the reference librarian that he could not find any information in our catalog on “attorney negligence.” The reference librarian asked me what subject heading we would use for this concept, and a quick search for “negligence” in this section of *Classification Web* told me that “malpractice” is the term to use. Both the reference librarian and patron were happy with this quick and accurate answer.

The final function offered on *Classification Web*’s menu — “**Subject Heading and Classification Number Correlations**” — is also among my favorite and most frequently used features. One of my pet peeves is OCLC records that do not contain Library of Congress classification numbers. However, assigning classification numbers to these records, as well as original records, is much less time consuming and frustrating when I use *Classification Web*’s correlation function. To find the classification numbers most frequently used with a specific subject heading or subject heading string in the Library of Congress database, I simply enter the

heading into the proper field on this screen. A list of possible classification numbers appears, in descending order by frequency of use. The number of bibliographic records that use a classification number is displayed in parentheses following the classification number. The classification numbers are hotlinked to allow the user to go directly to that number in the classification schedules. This correlation feature also works in reverse: to find the subject headings most frequently used with a specific classification number, enter the classification number into the appropriate field on the screen.

### Conclusion

As you may have guessed from this article, I like *Classification Web* very much and highly recommend that other catalogers try it. My only hesitation in recommending *Classification Web* applies to newer catalogers or cataloging students. Despite the Hierarchy Browser feature, the electronic version of the classification schedules cannot replicate the context one gains from viewing a two-page spread of a classification schedule in print format. Experienced catalogers are familiar with applying classification schedules and using tables realize when they need to “go deeper” into a schedule’s or table’s hierarchy. For this reason, these catalogers will be able to use *Classification Web* most effectively with the least investment of time or potential frustration. I realize that I am advocating that cataloging students learn how to use the “tools of our trade” (classification schedules, etc.) in paper format before being introduced to electronic formats, and the irony of this view is not lost on me. Perhaps my many years of experience in academic law libraries, where first year law students are taught how to do legal research by using print resources (reporters, Shepard’s, etc.) before being introduced to electronic resources (Lexis, Westlaw, etc.), is beginning to show.

In summary, *Classification Web* is a sophisticated, user-friendly, and versatile tool that is easy to learn and use. In addition to its immediate

applications for cataloging, *Classification Web* is even useful for performing reference work. I know many of us who participated in the pilot test are anxiously awaiting the announcement of the pricing structure, and hope it is reasonable enough to justify continued access.

<sup>1</sup> Library of Congress, *Classification Web* (visited May 23, 2001) <<http://classweb.loc.gov/>>.

<sup>2</sup> E-mail from Cheryl C. Cook, Classification Web Pilot Coordinator, Library of Congress,

Cataloging Distribution Service, to Karen Selden, Catalog Librarian, University of Colorado Law Library (Jan. 5, 2001, 16:05:35 EST) (on file with author).

<sup>3</sup> Posting of "ClassWeb Support," support@mail.lccweb.net, to "Class Web User Group," classweb@mail.lccweb.net (Feb. 2, 2001) (copy on file with author).

<sup>4</sup> Posting of "ClassWeb Support," support@mail.lccweb.net, to "Class Web User Group," classweb@mail.lccweb.net (Feb. 13, 2001) (copy on file with author).

<sup>5</sup> "Classification schedules BL-BQ, D-DR, G, KL-KWX and KB (except KBR and KBU) have not been approved for distribution by the Library of Congress and are provided for illustrative purposes only." Library of Con-

gress, *Classification Web Main Menu* (visited May 23, 2001) <<http://classweb.loc.gov/Menu/>>.

<sup>6</sup> These situations are particularly prevalent in the H and P schedules. Library of Congress, *Classification Web Quick Start Tutorial, Using the Enhanced Browser to Calculate Numbers* (visited May 23, 2001) <<http://lcweb.loc.gov/catdir/cps/classwebtutorial/4enhance.html#caution>>.

<sup>7</sup> Library of Congress, *Classification Web Quick Start Tutorial, Using the Enhanced Browser to Calculate Numbers* (visited May 23, 2001) <<http://lcweb.loc.gov/catdir/cps/classwebtutorial/4enhance.html#caution>>.



## 2001 Summary of OBS Survey Results



I truly want to thank those of you that completed the survey. Ellen McGrath wrote on her 2000 Summary of OBS Survey Results "hopefully, the 2000/2001 OBS survey will be on the web". I want to extend my appreciation to Anne Myers and Maria Okonska for making the survey available on the web this year. I mailed out 320 surveys and had 53 (16%) returned of which 28 were via the web. Thanks to Susan Chinoransky for designing a beautiful afghan as the prize.

### 1. Member Profile

*Area of responsibility:* 21 Administrator/Head of Technical Services; 21 Catalog Librarians; 3 Library Directors; 3 Computer Services; 1 Webmaster, 1 Acquisitions; 1 Adjunct Faculty

*Bibliographic Utility:* 35 OCLC; 11 RLIN Database/Online Catalog; Academic Libraries: 29 Innovative Interfaces; 4 SIRSI; 4 Endeavor/Voyager; 3 NOTIS; 2 Dynix; 1 DRA; 1 Horizon; 1 Ex Libris. Firm Libraries: 1 Sima Ocat; 1 Best Seller; 2 EOSi and 1 in-house.

*Type of Libraries:* 41 Academic; 5 Firm; 1 County; 1 Government Military Years in Law Libraries: 2 (1-3yrs); 6 (4-

6yrs); 6 (7-9yrs); 7 (10-13yrs); 9 (14-17yrs) 4 (18-19yrs); 19 (20+years)

*Are you a new OBS member?* 12=Yes; *Do you subscribe to OBS listserv?* 6=No; *Did you attend AALL Annual Meeting in Philadelphia?* 18=No

### 2. OBS Program Profile

The following programs were sponsored by OBS in Philadelphia. One half of those who responded to the survey attended the programs and ranked them as "Good."

- ◆ Core Competencies for Support Staff
- ◆ What I Like, Who Has It and Can I Have It? An Update on Library Integrated Systems
- ◆ Instant Gratification! The Z39.50 Gateway to Searching, Cataloging and ILL
- ◆ The Text Encoding Initiative and Electronic Legal Texts
- ◆ The Alphabet Soup Cooperative Cataloging

### New Program Ideas for AALL convention in Orlando in 2002

There are some great suggestions for future programs:

- ◆ Leadership gap – training your successor!
- ◆ Cross-training public services librarians for technical services projects
- ◆ Interface between the online catalog and the resources available on the web
- ◆ Mickey Mouse systems or Killer whale Applications – Library systems for small libraries – Update to 1999 program
- ◆ Mirror, mirror on the wall, who's got the best documentation of all? Comparison of local systems documentation
- ◆ An update on metadata, what people are doing for local projects, use of MARC record for metadata

Note: OBS is co-sponsoring programs on CORC (Metadata) and Technical services knowledge for Public services librarians in Minneapolis.

### 3. OBS SIS Activities and Products

*Technical Services Law Librarian* (quarterly newsletter), AALL Official Representative to MARBI Committee and Joint Research Committee were considered among the top 3 OBS SIS Activities and Products. The least approved was the OBS brochure.

#### 4. OBS-SIS Website

(<http://www.aallnet.org/sis/obssis/>)

##### What do you like about the OBS Website?

There were similar responses to this question so I will list them in a concise manner:

- ◆ Well organized
- ◆ Detailed
- ◆ Easy to navigate
- ◆ Clean design
- ◆ Useful information
- ◆ User friendly

Other comments were:

- ◆ It's improving all the time! I like the new look
- ◆ Like the website of the month
- ◆ Good way to distribute information
- ◆ It gives up to date information
- ◆ Links to vendor and the newsletter
- ◆ The survey online, it looks fantastic
- ◆ Handy source
- ◆ It's helpful to see past OBS sponsored programs
- ◆ Good links to TS-SIS, *TSLL* and library automation sites

##### What would you change about the Web site?

- ◆ Add the Mission statement/scope and purpose of SIS to the website —[Mission statement under development. Purpose now under "About the Section" link at Website.]
- ◆ Add an introductory section about who we are and what we do – maybe including how the SIS has changed overtime —[See [www.aallnet.org/sis/tssis/tsll/25-03/obshist.htm](http://www.aallnet.org/sis/tssis/tsll/25-03/obshist.htm)]
- ◆ Update on Strategic Planning — [See OBS Chair's column]
- ◆ I would like to see summaries about what the programs actually covered and how they were received rather than what they were supposed to cover —[Reports in *TSLL* begin again this year.]
- ◆ Use it for more educational purposes. Perhaps link to guide or have the membership create guides on basic systems task, the Web, PC maintenance and repair, Internet 101 —it will be a great online resource!
- ◆ Add local systems directory

- ◆ Could use some graphs and more color than blue
- ◆ Perhaps a link to other AALL SIS web sites (besides TS-SIS) would be helpful
- ◆ List of members could include information about systems/expertise
- ◆ Pull membership roster into site (as does TS-SIS) rather than linking to AALLNET

#### 5. Technical Services Law Librarian

This publication is fantastic. Those that responded considered as "excellent" the following columns accordingly: "Classification", "Subject Headings", "Description and Entry", "Marc Remarks", and "Miss Manager." A member was glad to see management issues there. Another member thinks that there should be more one-shot guest columns.

##### Are there specific topics or new areas of interest you would like to see addressed in future issues?

- ◆ To catalog or not to catalog web sites and Internet resources
- ◆ OCLC (CORC)
- ◆ How to deal with reproductions
- ◆ Vendor news
- ◆ Management issues in TS
- ◆ Web page design
- ◆ Local systems issues (probably not worthy of a regular column, though)
- ◆ Catalogs shared and other parts of a university non-law job descriptions

#### 6. How Can OBS Serve You Better? What do you need from OBS now?

- ◆ More info about the web
- ◆ A clear focus and definition of the SIS
- ◆ Information that lets me keep with changes in the cataloging world
- ◆ Not to merge with TS
- ◆ I'd like to keep receiving *TSLL* in hard copy.
- ◆ Continue great programming at annual meeting to keep me abreast of current issues/trends
- ◆ Some analysis of the changing vendor environment
- ◆ By taking a stronger lead in systems education, and development of both TS and PS librarians and staff
- ◆ Keep up the good work

- ◆ More on information/knowledge management, more on practical matter such as the 2000 Local systems meeting on being a beta test site.
- ◆ Continuing education concerning information in electronic formats (how to handle these)

##### What is OBS doing currently that is NOT useful to you?

- ◆ Duplicating messages from other list-serves
- ◆ I am glad that you aren't asking about a TS merger this year!
- ◆ Brochure is not useful

##### Other comments about OBS?

- ◆ I'm new to OBS SIS and I'm happy with the level of support available from colleagues
- ◆ Comments in the Strategic Planning showed people didn't know what OBS is.
- ◆ Great members! More need to become active to share the fun.
- ◆ Seem to get many messages that are duplicates of those in TS list. Merge the lists?
- ◆ This is a great way to do the survey
- ◆ Do more publicity to attract public services folks
- ◆ Valuable conduit for current professional awareness
- ◆ The two SIS's (OBS & TS) are really good for what tech services people need.
- ◆ OBS is still perceived as technical services librarians.

#### Conclusion

I want to thank each of you that completed the survey. It was good to see that 19 of the people that completed the survey have 20 plus years of library experience. As you can see there were quite a few suggestions for improving OBS. Therefore OBS will review the suggestions and will determine what can be implemented. I am indebted to those that volunteered to run for office and serve on committees. This survey demonstrates that we are growing professionally and yet there is room for growth.



Ismael Gullon  
Mercer University  
[gullon\\_i@mercer.edu](mailto:gullon_i@mercer.edu)

Dear TS-SIS Colleague,

On behalf of the TS-SIS Bylaws Committee, I would like to take this opportunity to write a few words about the 2001 Proposed Amendments to the TS-SIS Bylaws. These amendments will be submitted to the TS-SIS membership at the TS-SIS Business Meeting to be held in Minneapolis on Sunday, July 15, 2001, at 5:30 p.m.-6:30 p.m. Please consult the AALL Annual Program for the exact room assignment. *Your presence at the Business Meeting is critical in order for these amendments to be proposed and voted on.*

**Amendment I** is designed to tighten the statement of Object of the Section, as well as eliminating the phrase 'exchange of duplicates'.

**Amendment II** is designed to require fewer members' presence to constitute a quorum for conducting a Section meeting.

**Amendment III** is designed to correct the language regarding the election of Member-at-Large, since one is elected each year; to include the official name of the AALL publication, *Spectrum* instead of *Newsletter*; to insert phrases that allow for announcing candidates in an issue of the *Technical Services Law Librarian* as well as by electronic communication.

**Amendment IV** is designed to bring the Section into compliance with the AALL mandate that all elections be completed by May. The only way the Section can comply is to conduct a mail ballot, since our annual meeting is held in conjunction with the AALL annual meeting usually held in July. Amendment IV amends all Sections that refer to a secret ballot election at the annual meeting by eliminating that election method option.

**Amendments V and VI** are designed to add the exchange of duplicates activity to the Serials Committee, and eliminate the Exchange of Duplicates Standing Committee. The first charge given to the Committee by Chair Alva T. Stone was to: "propose bylaws changes which will eliminate the Exchange of Duplicates Committee as a committee, but also add language to show that this project will continue under either the Acquisitions or the Serials Committee." The choice of committee to be determined by members' preference as stated on the 2001 membership survey. The membership survey results, based on those responding, indicated a 50% preference for the Serials Committee. (38% of respondents chose Acquisitions; 12% had no comment).

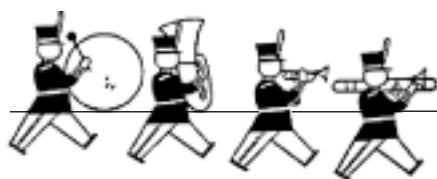
**Amendment VII** is designed to bring the Section's parliamentary procedure into conformity with AALL Bylaws, by replacing *Robert's Rules of Order* with the *Standard Code of Parliamentary Procedure*, also known as *Sturgis*'.

TS-SIS Bylaws Committee

Eloise M. Vondruska, Chair  
David S. Bratman

Susan Goldner  
Richard Jost

Lorraine Lorne  
Joe Thomas



## Technical Services Special Interest Section Bylaws Proposed Amendments 2001

### **Amendment I.**

*Proposed Amendment to Article II.*  
To Amend *Article II, Object*, by striking out the Arabic numerals 1. and 2.; by striking the phrase 'exchange of duplicates'; and by striking the phrase 'And, which lead to' and inserting the words 'to support'.

If amended, the article will read:  
"ARTICLE II. OBJECT

The object of the Technical Services Special Interest Section shall be:

To promote the communication of ideas, interests, and research which concern acquisitions, cataloging and classification, preservation of library materials, serials control, and other traditional areas of technical services; to support the development and coordination of the country's law library resources, in all types and sizes of libraries. "

### **Amendment II.**

*Proposed Amendment to Article IV, Section 2.*

To Amend Article IV, Section 2, Quorum, by striking the words 'percent of the'.

If amended, the section will read:

"Section 2. Quorum. Twenty (20) members shall constitute a quorum for any meeting of the Section."

### **Amendment III.**

*Proposed Amendment to Article VII, Section 2.*

To Amend *Article VII, Section 2, Candidates*, by striking 'members at large' and inserting in their place 'Member-at- Large'; by striking the word 'Newsletter' and inserting in its place 'Spectrum'; by inserting the phrase 'in an issue of' before the

*Technical Services Law Librarian*; and by inserting the phrase 'or electronic communication' after 'by mail' and before 'February 1.'

If amended, the section will read:  
"Section 2. Candidates.

The Nominating Committee shall choose a slate of at least two (2) nominees for each of the offices (a) Vice-chair/chair-elect, (b) Secretary/Treasurer, if one is due to be elected, and (c) Member-at-large. The Nominating Committee shall submit the names of the candidates, together with their written acceptances, to the Chair in sufficient time to enable the Chair to inform the members of the Section of the nominations either by publication in the February issue of the AALL Spectrum or in an issue of the Technical Services Law Librarian, or by mail or electronic communication, by February 1."

#### **Amendment IV.**

*Proposed Amendment to Article VII, Section 4, Section, 5, Section 6, Section 7.*

To Amend *Article VII, Section 4, Elections*, by striking 'may' and inserting 'shall' and then by striking the rest of the paragraph 'or by secret ballot...above.'

To Amend *Article VII, Section 5, Mail Ballot* by striking the phrase 'If the election of officers is to be conducted by mail' and then inserting the remainder of Section 5 in Section 4, Elections and eliminating it as Section 5.

To Amend *Article VII, Section 6, Secret Ballot at Annual Meeting* by striking

the section.

To Amend *Article VII, Section 7, Run-off Elections*, by striking 'Run-off' or 'run-off' and inserting 'Tiebreaker' or 'tiebreaker' in each instance. Section 7 to be renumbered as Section 5 if Section 5 and Section 6 above are struck.

If amended, the Sections will read:

"Section 4. Elections.

The officers of the Section shall be elected by mail ballot. The Secretary/Treasurer shall mail ballots to each member of the Section prior to April 1. Ballots shall be marked and returned to the Secretary prior to May 1. For each office, the candidate receiving a plurality of votes cast shall be elected. Candidates elected shall be reported at the annual meeting of the Section by the Secretary/Treasurer. All candidates shall be notified of the results of the election at the earliest possible time.

Section 5. Tiebreaker Elections.

In the event of a tie, a tiebreaker election shall be held at the annual business meeting. Tiebreaker elections shall be by secret ballot of the members of the Section attending the meeting. The ballots shall be counted and the candidate with the largest number of votes declared elected. "

#### **Amendment V.**

*Proposed Amendment to Article IX, Section 1c.*

To Amend *Article IX, Section 1c*, by inserting the sentence "This committee also encourages the exchange of duplicate materials among law libraries by issuing periodic lists of exchange

materials available from member libraries."

If amended, the section will read:

"Section 1c. The Serials Standing Committee provides a forum for addressing problems unique to serial publications including, but not limited to, check-in systems; subscription agencies; binding; claiming; and record keeping. This committee also encourages the exchange of duplicate materials among law libraries by issuing periodic lists of exchange materials available from member libraries."

#### **Amendment VI.**

*Proposed Amendment to Article IX, Section 1e.*

To Amend *Article IX, Section 1e*, by striking it.

#### **Amendment VII.**

*Proposed Amendment to Article XI.*

To Amend *Article XI*, by striking 'Robert's Rules of Orders' and by inserting 'The Standard Code of Parliamentary Procedure'.

If amended, the article will read:

"ARTICLE XI. CONDUCT OF AFFAIRS AND PARLIAMENTARY AUTHORITY

The Technical Services Special Interest Section shall conduct its affairs in conformity with the Constitution and Bylaws of the American Association of Law Libraries. The rules of parliamentary procedure as contained in the most recent edition of The Standard Code of Parliamentary Procedure shall govern all meetings of the Section. " ☐

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## OBS & TS Program Descriptions

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### **Subject Authority Cooperative Project (SACO)**

(WorkshopW-3)

Coordinator: Christina Tarr

Date & Time: Saturday, July 14, 9:00 AM-4:00 PM

The Subject Authority Cooperative Project (SACO) is a component of the Program for Cooperative Cataloging

(PCC). A policy specialist from the Library of Congress Cataloging and Policy Support Office (CPSO) will present the concepts and practical aspects of creating and changing subject authority headings for Library of Congress Subject Headings (LCSH). The basic session, held in the morning, will focus on the fundamentals of constructing and submitting subject proposals on any

topic. A more advanced session, held in the afternoon, will focus on law subject headings specifically and on proposing new class numbers and changes to the Library of Congress Classification (LCC) system. Attending the SACO workshop gives new participants a glimpse into the essential role they may play in cooperative cataloging activities.

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**Everything Old Is New Again: Second- (or Third-) Generation Automated System Challenges** (Program C-1)

Coordinator/moderator/speaker: Richard Jost Date & Time: Sunday, July 15, 2:45-4:00 pm

An overview of system-related issues will be explored based on the difference between the “old” days, when libraries first moved toward an automated library environment, to the present, when many libraries need to migrate to new systems to handle the increasing complexity of library operations. The challenges remain the same: the successful library manager must research the marketplace, establish procedures for data migration, and develop a management structure for staff training. Using recent library experiences, the speakers will discuss the principles to consider when embarking on a system review process from three perspectives: selecting the appropriate bibliographic utility (based on a comparison of the OCLC and RLIN systems), migrating data from one local system to another, and adding a second library to an existing system. The discussion will detail the basic issues to consider when evaluating automated systems for specific library environments.

**New Roles for Catalogers: Subject Access to the Web** (Program D-4)

Coordinator: Patricia Sayre-McCoy Date & Time: Sunday, July 15, 4:15-5:15 pm

Internet subject searches too often result in an unmanageable number of hits. In many cases, this is due to the fact that the metadata headers of Internet resources are either missing entirely or contain uncontrolled, imprecise, and/or inappropriate descriptor terms. This program will focus on these challenges: assigning subject headings to Web sites in order to improve Internet subject searches, improving the metadata header area of HTML/XML documents, on providing access to Web sites that are evolving and changing, and explaining how controlled vocabularies can help or hinder subject searches on the Web. Speakers will discuss the use of subject-rich metadata in the headers of

digital resources and the use of traditional Library of Congress subject headings in MARC records.

**Put a CORC in IT: The Cooperative Online Resource Catalog's Attempt to Control the WWW Information Flow** (Program E-6)

Coordinator/moderator: Pam Deemer Date/Time: Monday, July 16, 10:15-11:45 am

The OCLC Cooperative Online Resource Catalog (CORC) is a Web-based cooperative system for building bibliographic records and pathfinders for electronic resources. An OCLC representative will discuss the CORC program's utility in terms of the bibliographic records and pathfinders created, the role the Dublin Core and MARC formats play, and the cost. Examples of CORC records and the tools used to construct them will be demonstrated. Two technical services librarians and a public services librarian will each discuss their decision to join the initial CORC pilot project, the impact it has had on their workflow and service to patrons, and the advantages and disadvantages of using Dublin Core or MARC records for Internet resources. Find out how effective CORC can be, and learn about its related side benefit—making the addition of meaningful metadata to local Web sites easier.

**Cataloger's Dilemma: When and How to Use Law Uniform Titles**

(Program F-2) Coordinator: Michael Brown Date & Time: Monday, July 16, 4:15-5:15 pm

Uniform titles are assigned to some legal materials to both collocate and distinguish different items in the catalog. To properly organize and search online catalogs, catalogers and reference librarians need to know how AACR2 25.15 and 25.16 apply to works containing laws and treaties, respectively. Using specific examples, this program will emphasize a practical approach to helping catalogers determine when legal uniform titles are appropriate and how to apply them. Speakers will also discuss how these uniform titles display in the online catalogs and collocate various law and treaty materials.

**New Roles? Retooling Yourself for Work in the 21<sup>st</sup> Century**

(Program F-3) Coordinator/moderator: Mary Jane Kelsey Date & Time: Monday, July 16, 4:15-5:15 pm

Have you ever wished that you could see the bottom of your “in” box or wished for a longer day? This program on retooling for the new millennium will examine current theory and methodology for effectively managing the challenges in our rapidly changing workplace. The speaker will discuss her experience as a facilitator for Stephen Covey's *First Things First* program and the decision of the Yale University Library Human Resources Department to implement the *Professional Mentor* program.

**Implementing the MARC 21 Format for Holdings Data: The New Frontier in Technical Services** (Program G-6)

Coordinator/moderator: Chris Long Date & Time: Tuesday, July 17, 9:00-10:30 am

Having successfully installed the serials module of their integrated library systems, many libraries are ready to take the further steps of implementing the MARC 21 Format for Holdings Data. The Holdings Format, however, is radically different from MARC 21 formats that librarians are already familiar with. This program will explain the various Holdings Format fields, offering specific examples that illustrate how to handle publications received by law libraries, such as pocket parts and revision volumes. The program will also demonstrate the advantages and disadvantages of using the Holdings Format, investigate staff training issues and show how to incorporate the creation of MARC holdings records into workflow, as well as examine OPAC display considerations.

**Revising Rules to Reflect the New Reality: Changing the Definition of Serials in AACR2**

(Program H-1) Coordinator: Joan Liu Date & Time: Tuesday, July 17, 10:45-12:15


Web sites and databases now parallel the familiar cataloging challenges of

legal loose-leaf publications. As a result, "serials" cataloging has become more complex and not only for law catalogers. How should these "unconventional," but proliferating, materials be defined and described? In 1997, three models for the redefinition of "serial" were proposed with the objective of revising AACR2 Chapter 12. Since then, the library community has discussed these proposals at length at professional conferences and produced several responses. Technical services law librarians play a vital part in this interaction with the cataloging rule-making bodies in these new notions of serials. These proposals and the progress on this dialogue since 1997 will be examined, particularly as they apply to law libraries. The speakers will also

address the actions by the bibliographic utilities and local systems vendors in response to the current status of the proposed revisions.

**What You Don't Know Can Hurt You: Essential Technical Services Knowledge for Public Services Librarians** (Program K-2) Coordinator: Carmen Brigandi Date & Time: Wednesday, July 18, 10:30-11:45 AM

Modern online catalogs integrate information from a variety of sources—cataloging, serials, acquisitions, and circulation records. Public services librarians and library users now have access to this wealth of information on their desktops. As technical services records go public, the technical services librarian's expertise in creating user-

friendly records is sometimes lost to public services librarians. In this session, participants will learn more about the variety of records in the catalog and how to best use and interpret them. As public services librarians learn to mine the catalog for more information, they will also develop confidence in working with their technical services colleagues to improve and enhance access to the collection. In this program, current and former technical services librarians will define "essential" technical services knowledge and illustrate ways in which the complementary skills of public and technical services librarians can be harnessed to improve access to the collection. 

## ***OBS & TS Meetings and Programs Schedule***



### **SATURDAY, July 14**

- 9:00-4:00 pm **Subject Authority Cooperative Project (SACO) Workshop W-3,**
- 4:00-6:00 pm TS 2000/2001 Executive Board Meeting
- 4:00-6:00 pm OBS 2000/2001 Executive Board Meeting
- 6:00-7:30 pm TS/OBS/RIPS/CS Joint Reception

### **SUNDAY, July 15**

- 11:45-1:00 pm OBS/TS Research Roundtable
- 2:45-4:00 pm *C-1, Everything Old Is New Again: Second- (or Third-) Generation Automation System Challenges*
- 4:15-5:15 pm *D-4, New Roles for Catalogers: Subject Access to the Web*
- 5:30-6:30 pm TS Business Meeting

### **MONDAY, July 16**

- 7:00-8:45 am TS Cat & Class Committee
- 7:30-8:45 am OBS Web Advisory Committee Meeting
- 7:30-8:30 am TS Acquisitions Committee
- 7:00-8:45 am TS Preservation Committee
- 10:15-11:45 am *E-6, Put a CORC in It: The Cooperative Online Resource Catalog's Attempt to Control the WWW Information Flow*
- 4:15-5:15 pm *F-2, Cataloger's Dilemma: When and How To Use Law Uniform Title*
- 4:15-5:15 pm *F-3, New Roles? Retooling Yourself for Work in the 21st Century*
- 5:15-6:15 pm OBS Business Meeting
- 5:15-6:15 pm TS Serials Committee

### **TUESDAY, July 17**

- 7:30-8:45 am OBS OCLC/WLN Committee Open Discussion
- 7:45-8:45 am TS Heads of Tech Services Roundtable
- 9:00-10:30 am *G-6, Implementing the MARC 21 Format for Holdings Data: The New Frontier in Technical Services*
- 10:45-12:15 *H-1, Revising Rules to Reflect the New Reality: Changing the Definition of Serials in AACR2*
- 12:15-1:30 pm TS Preservation & Binding Roundtable
- 12:15-1:30 pm TS Cataloging & Classification Roundtable
- 12:15-1:30 pm OBS Education Committee
- 5:15-6:15 pm TS Heads of Cataloging in Large Libraries Roundtable
- 5:15-6:15 pm OBS Local Systems Committee Open Discussion
- 5:15-6:15 pm TS Acquisitions Roundtable
- 6:30-7:00 pm *TSLL* Editorial Board

### **WEDNESDAY, July 18**

- 7:00-8:45 am TS 2001/2002 Executive Board
- 7:00-8:45 am OBS 2001/2002 Executive Board
- 10:30-11:45 am *K-2, What You Don't Know CAN Hurt You: Essential Technical Services Knowledge for Public Services Librarians*
- 12:15-1:30 pm TS Education Committee

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## So Long, Farewell, Auf Wiedersehen, Goodbye!



It is with the saddest of hearts that we submit to you our last issue as editors. Surely the heavens weep with us today. Well, okay, maybe not.

We had a wonderful time editing this fabulous newsletter. OBS and TS are truly blessed with an extraordinary amount of talent and it has been a pleasure to work with each of you. Thanks so much for giving us this experience, for being so supportive and encouraging, and mostly, thanks for all the chocolate offerings (we still accept these, by the way).

Our best wishes to Joe Thomas as he takes over as editor-in-chief and a special thank you to all of our dedicated columnists and contributors.

Anna Belle and Linda  
(with apologies to Rodgers and Hammerstein)



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