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## LC PLANNING SESSION ON PINYIN CONVERSION

Thursday, March 11, 1999

9:00 -- 11:00 AM

Attending: Karen Smith-Yoshimura of RLG, Glenn Patton of OCLC, and CEAL Pinyin Liaisons (Susie Cheng, Yu-lan Chou, Amy Tsiang, Peter Zhou)

LC had distributed its most recent update of a general timeline for pinyin conversion, and asked those present to help add needed tasks, and suggest adjustments in timelines.

OCLC said that it will convert, but because attention is being paid to other more immediate concerns, the schedule for OCLC conversion has not yet been determined. OCLC requested that LC announce changes to Chinese place names. LC noted that changes are being announced on the CPSO home page, and will also be announced in the Cataloging Services Bulletin. OCLC also asked LC to announce changes to subject headings in advance of the changes being made, and to announce changes to descriptive headings as soon as feasible.

LC will be sending draft conversion specifications to RLG in the near future. RLG will then use the specifications to draft a conversion program. The program will be tested and retested, as necessary, and the spec adjusted, in consultation with LC. OCLC and RLG agreed that the two organizations would share only functional requirements (and not conversion programs) because their system codes are very dissimilar. It was further agreed that, when final specifications are arrived at, they will be made available to all.

OCLC was concerned that, if LC utilizes a new ILS capability for global update, huge numbers of changes might come through without prior warning. OCLC asked that LC provide notice of major changes, and LC agreed to do so.

OCLC asked whether RLG or LC had plans to mark bib records that have been changed. OCLC is concerned about being able to tell whether a record has been converted and need not be processed again. There is also concern about identification and conversion of records created and updated during the conversion period. RLG wondered if there is an exported local field which is common to all systems (which could be utilized to indicate conversion to PY). RLG thought that, in the absence of a common local field, perhaps one could consult the version date and other update information (i.e., all changed records from certain dates are in PY).

LC expressed concerns about conversion of serial records: 1) that official serial records be converted; 2) that converted records be redistributed; and 3) that agreement be reached on how serial records will be converted and distributed, to avoid potential confusion over differing versions. Various options were discussed. The parties agreed to work together to resolve this issue in the future.

After receiving functional specifications from LC, RLG will write a conversion program and test it. Then adjustments will be made to the specs, if necessary. To help assure uniformity of results, it was agreed that the finalized specs would be made available to OCLC and any libraries

that requested them. RLG cautioned that drafts should not be widely distributed, since confusion could result should some consider the draft to be final.

The group discussed options for Day 1. It was agreed that Day 1 would mark the time from which 1) Chinese will be romanized according to PY, and 2) distributed records will contain only PY romanization. It was recognized by all that it was much too soon to posit an exact date for Day 1; the target date is spring 2000.

LC will explore different approaches to conversion of the Name Authority File (NAF). LC requested input and assistance from RLG and OCLC. RLG suggested that LC organize NACO involvement for the conversion of name authorities.

LC urged CEAL to propose tasks and projects that need to be undertaken to reduce impact of conversion on CEAL (and other) libraries, and to initiate action where necessary -- for example, LC suggested such projects as addition of 053 fields on NARs for Chinese literary authors, and compilation of a list of cutters for local places and cities in the DS793 and DS796 schedules.

RLG reminded those present of the closed listerv, "Pinyin-L", which was created for CEAL Task Force representatives, OCLC, RLG, and LC to discuss the conversion project. It was agreed that the list be employed for future communications and planning. Names will be added and deleted to update the list of recipients.

(Notes: Phil Melzer)