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SUMMARY REPORT ON PINYIN CONVERSION PLANNING MEETING IN WASHINGTON D.C.

On October 7,1999, representatives from Columbia University, the Council on East Asian Libraries (CEAL), Harvard University, the Library of Congress, OCLC, RLG, the University of California at Berkeley, the University of California at Los Angeles, the University of Chicago and the University of Michigan met at the Library of Congress to plan for Pinyin conversion.

This meeting was organized by Harvard University Library for the management staff of some major research libraries with large Chinese collections to come together to coordinate the task of converting their local library catalogs to Pinyin. Meeting participants discussed a wide range of topics, including conversion of authority files, definition of Day One for Pinyin conversion, prerequisites for Day One, OCLC/RLG services for libraries, post Day One clean-up work, tasks for local systems, and a conversion timeline for the library community.

Although the Library of Congress has already started changing name authority headings to Pinyin, meeting participants strongly felt that such changes should not be made to bibliographic records until Day One. The group also agreed that while changes to name authority records (NARs) will proceed before Day One, the changed records will not be distributed until Day One.

They deliberated on a record-level marker to be used in bibliographic and name authority records for Pinyin conversion. Such a MARC coding would prevent duplicate conversion by identifying a) if a record is Pinyin-compliant with no need for conversion, or b) if record is completely converted, or c) if a record is partially converted and further conversion will be needed after Day One.

To all research libraries with Chinese language records, Day One is defined as the date when creation of all new Chinese records (including both original cataloging and acquisitions records) will be using Pinyin transliteration of Chinese scripts. In other words, Day One will be the cut-off date for ALL libraries to switch to the Pinyin standard in newly created records. The group strongly recommended that by Day One, the majority of NARs, if not all, be converted to Pinyin. LC will have completed changes in cataloging classification by this time as well. In addition, LC’s Chinese language bibliographic records will have been converted by Day One. Those converted LC records will be properly marked with a Pinyin marker.

Immediately after Day One, there will be a period (currently designated as no more than six months) for the national utilities of OCLC/RLIN to convert all their Chinese language bibliographic records to Pinyin and prepare snapshots of bibliographic records and NARs for the individual libraries they serve for Pinyin conversion. During this period, each individual library will continue to keep its old MARC records in Wade-Giles intact (to be machine-converted when its snapshot of records is prepared and released by the national utility for local conversion).

While the individual library will create all new records in Pinyin during this period, it will continue to adapt Pinyin as well as Wade-Giles records from the national utilities for copy-cataloging. When a Pinyin record is created or adopted from the national databases, the individual library will insert a record-level marker to indicate Pinyin compliance to avoid duplicate conversion later. It is worth
noting that currently, there are already records with Pinyin headings in the national and local databases, without a record-level Pinyin marker. It is estimated that such headings, most of which are geographic names, have a low chance of triggering double conversion.

During the six-month “mixed” period after Day One, individual libraries will prepare for Day Two, the target date by which the individual library will have started both original and COPY cataloging in Pinyin to set the stage for the total machine conversion of its local catalog. Day Two will occur during the six month period when national utilities will have converted most of their Chinese records to Pinyin. Shortly after Day Two, the individual library should convert all its bibliographic records and NARs to Pinyin AT ONCE by using the snapshot provided by national utilities, or by sending its Chinese records to the national utility for conversion. After the local catalog is completely converted, the individual library will discontinue the use of a Pinyin marker in its records.

All participants agreed to the following timeline for converting Chinese language records. This timeline does not cover conversion of non-Chinese records, which will be addressed separately by LC, national utilities, CEAL and individual libraries later.

Timeline for Pinyin conversion

A) January 1, 2000 -- A record level Pinyin marker will be proposed by LC and national utilities. National utilities will have decided on conversion options.

B) October 1, 2000-- DAY ONE Individual libraries all begin to use Pinyin in newly created records (original cataloging and acquisitions records). National utilities will have finished testing specs and test records. Most, if not all, NARs will have been converted to Pinyin by LC and national utilities. LC’s Chinese language bibliographic records will have been converted to Pinyin. LC will have completed changes in classifications related to the switch. Pinyin is used in all new bibliographic records and NARs from this date.

C) By April 1, 2001-- DAY TWO Individual libraries will have begun to use Pinyin in both original and copy-cataloging records. National utilities will have converted most Chinese language records in their databases, and will be ready to release snapshots for individual libraries. Shortly after Day Two, individual libraries begin to convert its local machine catalogs to Pinyin. Post conversion clean-up work begins.

D) October 1, 2001-- Record-level Pinyin marker will be discontinued. Conversion of individual libraries’ OPACs will have been completed.

Meeting participants urge the library community not to start using Pinyin before Day One. It was also suggested that further deliberations regarding Pinyin conversion continue during the ALA Mid-winter Conference and the CEAL Annual Meeting in 2000. The Library of Congress will post the full minutes of this meeting on its Pinyin web site.

Reported by
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