

CATALOGUING RULES AND THEIR CHANGES – CURRENT SITUATION IN SLOVENIA

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Abstract

The article is a short overview of the development and changes in cataloguing practice in Slovenian libraries from World War II to the present day, with special attention paid to the role and duties of the principal catalogue editor and the National Cataloguing Committee, revealing future actions and trends in the development of the national cataloguing codes.

Keywords

descriptive cataloguing, national cataloguing codes, shared cataloguing, principal catalogue editor, RDA

Izveček

Članek predstavlja kratek pregled razvoja in sprememb v katalogizacijski praksi v slovenskih knjižnicah od druge svetovne vojne do danes, s posebnim poudarkom na vlogi in nalogah glavnega urednika kataloga in nacionalne komisije za katalogizacijo. Razkriva tudi načrtovane aktivnosti in trende pri razvoju nacionalnih pravil za katalogizacijo.

Ključne besede

opisna katalogizacija, nacionalna katalogizacijska pravila, vzajemna katalogizacija, glavni urednik kataloga, RDA

BACKGROUND

UNIMARC 2014, the 4th UNIMARC Users' Group Meeting was the occasion to present the current situation regarding cataloguing rules and changes made to these rules in Slovenia up to now. I have over 30 years of experience in cataloguing and I have participated in the implementation of those changes. The aim of this article is to show that cataloguing in Slovenia has always been a very important task and that it has always followed international trends.

Before World War II the oldest catalogues in the National and University Library were based on various different cataloguing rules, among others on the very well known Prussian Instructions. It was obvious that the old concept was no longer applicable and new cataloguing rules were required. They were compiled by the well-known and respected cataloguer Pavle Kalan, based on American cataloguing practice and approved as the national cataloguing code by the Slovenian Library Association and published shortly after World War II by the National and University

Library in Ljubljana as *Abecedni imenski katalog*. They were intended for cataloguing in Slovenian scientific and academic libraries.

The first introductory sentence in the code reads: "The responsible and demanding work of precise and correct bibliographic description, including the management of catalogues, has to be carried out by the members of library staff who have adequate theoretical education and practical training." (*Abecedni imenski katalog*, 1947, p. 3)

This has always been the case and is also a fact not to be neglected, even in a difficult economic situation.

Pavle Kalan (1900–1974) graduated in Slavic and Romance Studies at the University of Ljubljana initially working as a teacher before becoming a librarian at the Slavic Library; later he worked as a librarian and senior scientific researcher at the National and University Library in Ljubljana. He taught short courses on librarianship in Slovenia and with the establishment of the chair

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for librarianship at the Academy of Pedagogical Sciences, he became the first Slovenian university lecturer for cataloguing. (Enciklopedija Slovenije, 1990, zv. 4, p. 371)

As the leading expert in cataloguing he thoroughly studied international trends and introduced a modern approach to cataloguing into all types of libraries by publishing articles and papers dealing with cataloguing issues, mainly in descriptive and partly also subject cataloguing. He actively took part in many international symposia until his retirement. Pavle Kalan was also involved in professional terminology in librarianship.

FROM THE SIXTIES TO THE EIGHTHIES

Twenty years later, in 1967, after a very long period of hard work and taking into account international trends, the second edition of the cataloguing code was published. Once again, the compilation was undertaken by Pavle Kalan, this time based on the Paris Principles, which he helped set up with his contributions on the notation of proper names. While he was working on *Abecedni imenski katalog 67*, the National and University Library in Ljubljana excused Pavle Kalan from his everyday duties and activities for a year to allow him to concentrate fully on the preparation of the new edition of cataloguing rules.

The development of ISBDs on the international level in the 1970s was soon incorporated in Slovenian translations by Maks Veselko (1926–), another cataloguing researcher and university lecturer. With the approval of international standards for bibliographic descriptions, and their wide acceptance in the library environment, part of *Abecedni imenski katalog 67* proved out-of-date, but nevertheless it should be noted that AIK 67 and its rules for determining access points together with ISBDs were in use for a very long time and formed the basis of modern cataloguing.

Meanwhile, the idea of a unique cataloguing code for the territory of the former Yugoslavia was fully supported and carried out by Eva Verona (1905–1996), mathematician by education, cataloguer by profession. She worked at the National and University Library in Zagreb (Croatia) her entire life and by publishing theoretical articles and bibliographies became a world-renowned cataloguing expert (Horvat, 2005). All the hard work on the Yugoslav cataloguing code could not have been done without the help of cataloguing experts in all national libraries of the former Yugoslavia engaging in lively discussions on the manuscript and providing different examples. The results of this intense work and collaboration were published in two extensive volumes of *Pravilnik i priručnik za izradbu abecednih kataloga* known as PPIAK in 1970 and 1983, followed by the 2nd edition of volume 1 in 1986. It was and still is one of the most complex and complete cata-

loguing manuals with numerous examples in different languages.

Central cataloguing of the Slovenian printing production (Jugovec, 1964) was introduced in Slovenia in the late 1960s and carried out once again by the National and University Library with the full support of the Slovenian Library Association. The beneficiaries were scientific, academic, public and school libraries. Between 1977 and the beginning of the 1990s catalogue cards had also been exchanged among the national libraries (Veselko, 1978). Cataloguing knowledge and special librarians' skills were concentrated in national libraries, where PPIAK was used in its original language along with the translations of ISBDs as unique cataloguing tools.

THE NINETIES AND LATER

The late 1980s and early 1990s were very stressful and turbulent. New and revised editions of ISBDs were published and it was decided that UNIMARC was going to be used as the prescribed format for the exchange of bibliographic records. COBISS was in full progress when in 1991 it faced new challenges due to the disintegration of Yugoslavia. In Slovenia, scientific and academic libraries as well as public and school libraries all joined COBISS, because of which new knowledge, expertise and skills were required from librarians. The system itself quickly revealed the differences in cataloguing practice in different libraries, the quality of bibliographic records in general being rather poor. Different measures were undertaken to improve that, such as:

- The role of the principal catalogue editor was introduced on the initiative of the Slovenian Library Association, carried out and fully supported by the National and University Library in 1993.
- Before cataloguers were able to start working within the system, they had to pass a test creating a certain number of bibliographic records, which were checked and evaluated by the principal catalogue editor as well as IZUM. Recommendations to correct bibliographic records and further individual instructions were provided. The evaluation system is still in use today.

The basic duty of the principal catalogue editor is the precise coordination of bibliographic processing regardless of the type of library material. Together with IZUM, the principal catalogue editor is the curator of the MARC structure, thus, insuring flawless data exchange.

The coordination applies to two basic areas:

- complying to unique codes of bibliographic description, e.g. international standards, PPIAK and rules for

- subject description, and
- together with IZUM, harmonisation of COMARC data input and development of the local COMARC format in accordance with UNIMARC, its changes and updates.

The editor's main tasks are (Kanič, 2002):

- monitoring international bibliographic standards and their evaluation regarding the relevance for the national bibliographic standards;
- introducing new national bibliographic standards following international standards;
- producing proper guidelines and instructions for computer software support;
- harmonisation of bibliographic standards and use among individual libraries;
- developing sample records for new types of material and their implementation in libraries;
- analysing the quality of bibliographic records regarding their congruity and compliance with standards, applied to a set of record samples;
- analysing the causes and reasons for systematic errors in bibliographic records;
- correcting errors and providing adequate standard updates and amendments;
- planning programmes for education and training, including the production of adequate teaching materials for the creation and improvement of bibliographic records;
- consulting fellow cataloguers on questions regarding bibliographic records and standards for all types of library material;
- cooperating with IZUM and local IT support services regarding the development, installation and testing of the information system, creation, storage and analysis of bibliographic records;
- consulting and supervising bibliographic specialists in cooperating libraries;
- using the expertise, educating and training specialised staff for the demanding task of creating bibliographic records.

As a result, cataloguing became a very complex and demanding job. PPIAK written in the Croatian language was often not very easy to understand and interpret. Thus, the first step to make it more user-friendly for Slovenian cataloguers was to translate the indexes and to publish them, which was done in 1998. At that point we faced a number of different terminological problems, which hopefully were solved satisfactorily. At the same time, cataloguers were very much aware of the fact that PPIAK in some segments was out-of-date because it did not include all types of library material and did not follow the changes in revised editions of ISBDs. The Catalogu-

ing Committee of the Library Association followed these changes closely, and included them in everyday work, but these guidelines and instructions had, unfortunately, never been collected and published as a manual. That caused inconvenience and additional measures had to be taken.

In September 1997, the Ministry of Science and Technology nominated an expert group to investigate the current situation and to set the basis for a new cataloguing code in the Slovenian language. There were three possible solutions:

- translation of PPIAK,
- translation of AACR2 and accepting AACR2 as the national code, or
- a new cataloguing code.

The first possibility was rejected for obvious reasons, the second one was said to be too different and far-fetched regarding our cataloguing environment and practice, so the expert group opted for the third option: the preparation of a new cataloguing code.

The work was supposed to be carried out in three phases:

- analysis of the current situation;
- setting the foundations for a new cataloguing code,
- creating a new cataloguing code itself.

Unfortunately, due to the lack of financial means, it was decided that only the first part of the project was to be undertaken.

The majority of Slovenian libraries take part in the creation of the COBIB database, which is the central part of the national COBISS system. Even though the structure and profile of library staff varies a lot, equal quality criteria for bibliographic records must be applied in all member libraries regardless of their type and size. To meet their needs, the most common problems occurring in their work were taken into consideration in the course of the preparation of the manual so the manual deals with all types of library material such as monographs, serials, non-book material, component parts, both in printed and electronic form.

It was planned that the analysis of the current situation was to include still applicable provisions from AIK 67, still applicable provisions from PPIAK, provisions from all different ISBDs and their revised editions, as well as findings from the practical work, and was to be presented as a manual.

The results of the project, carried out in a relatively short period of time, were published in a preliminary edition

of PREKAT (*Priročnik za enostavno uporabo katalogizacijskih pravil*) in 2000, followed by a revised edition, and ZNAČKA (*Priročnik za določanje značnic pri katalogizaciji*) in 2001. These manuals were intended as a basic tool not only for librarians in small libraries, where cataloguing is only a part of their job, but also for beginners in cataloguing, students, and all those in libraries who have to be familiar with cataloguing. For precise and thorough cataloguing PPIAK and adequate ISBDs were still to be used. The main leader of this project was Zlata Dimec (1955–2002), another National and University Library researcher and developer in cataloguing with international experience. She translated *Unimarc Manual. Bibliographic Format* (published in 1999) and the final report of *Functional Requirements for Bibliographic Records* (2000). She initiated the translation of *Unimarc Manual. Authorities Format*, which was finished after her death in 2003. The CONOR authority file (for personal names first) was a new challenge for Slovenian librarians brought to life in 2003.

THE PRESENT DAYS

Today, 13 years later, PREKAT and ZNAČKA together with COMARC/B, Format za bibliografske podatke, continue to be in use, but they definitely do not cover and provide solutions for all the problems cataloguers might face in their everyday work.

Different questions on cataloguing and COMARC structure are addressed daily to the principal catalogue editor and other cataloguers in the National and University Library and IZUM, where skilled cataloguers have been educated as well. A lot of information is available, many explanations and interpretations have been given, so all this has to be put in writing and published in one publication. The amount of work, different fields of competence and responsibility called for more than one person, which is why, in December 2008, the Advisory Council of the National and University Library established the National Cataloguing Committee in order to solve the technical problems and cataloguing issues in the field of formal bibliographic description.

The main activities of the Committee (Komisija za katalogizacijo pri NUK, 2009) are:

- preparation of recommendations, guidelines and manuals for the bibliographic description for all types of library material;
- suggesting new additions and changes regarding the bibliographic description (e.g. changing cataloguing rules, implementing new cataloguing manuals, etc.);
- approving translations of international standards for bibliographic description (ISBDs) and other recom-

mendations and guidelines for cataloguing;

- cooperation with IZUM in solving problems and dilemmas regarding the use and implementation of COMARC and UNIMARC.
- The top priority of the near future is undoubtedly the translation of RDA (Resource Description and Access) and the study of the possibilities of RDA implementation in the Slovenian library environment, and based upon that:
 - the preparation of the formal proposal for the use of RDA as a national cataloguing code;
 - finally, a user manual for cataloguers is expected to be produced.

The members of the Committee are cataloguing experts from different types of libraries who, on a daily basis, deal with specific types and forms of library material, representatives of IZUM and the National and University Library. Public libraries have large quantities of special library material, so their cataloguers can be trained to become excellent specialists, and their knowledge should be used for the common good.

IZUM and the National and University Library are very much concerned with the quality of COBIB. They constantly monitor bibliographic records and their creators by checking the bibliographic records at random twice a year and providing general and individual recommendations and guidelines to correct them. They started this procedure as a project about 16 years ago and the project is still ongoing, so with new generations of cataloguers, it has a bright future ahead.

COBIB is not only a library catalogue but has become much more. It serves the academic and research community in the evaluation of scientific and research work and is used as a tool for author compensation based upon library loan in public libraries. Major groups of OPAC users, such as authors, publishers, researchers or just random users tend to have an impact on different data elements to be included in or excluded from the bibliographic records and/or displays, generally in order to present certain data about themselves or their institution or other data. Because of that and for many other reasons, data appearing on publications changes and tends to be more precise and more accurate, which in data processing causes problems in structuring the data according to COMARC and puts pressure on cataloguers.

TODAY OR TOMORROW

We have definitely arrived at a point where something needs to be done, especially as we know that "big things" are happening on the international level. In order to satisfy the users' complex needs for the right and accurate

information, the FRBR model was set up and will be implemented in libraries, AACR2 is going to be replaced by RDA, the use of MARC21 is slowly diminishing, etc. We are very much aware of these changes.

For the time being we are close observers of the development and progress of RDA in Europe, waiting to see what path other national libraries will follow as the system can only be fully operational if it has many followers. We cannot be, and do not want to be, an isolated island, we cannot afford not to follow international trends, which are linking rather than dividing elements and make the world smaller, more unique, more complex and richer in information.

The first and the most important task ahead is the translation of the Consolidated Edition of International Standard Bibliographic Description. As numerous new expressions were introduced we once again face terminological problems in our language. As the work progresses I am sure we can promise the translation to be ready by the end of the year.

The translation will be followed by a preliminary edition of the manual, which will include elements of bibliographic description adjusted to the consolidated edition of ISBDs, and changes in defining authorship, with guidelines how to form and define access points, already approved by the National Cataloguing Committee. This manual will also define different levels of bibliographic description for different purposes. This is a manual every cataloguer is eagerly anticipating.

In 2014, we also plan to establish a working group to work on the concept of the new national cataloguing code.

THE DAY AFTER TOMORROW

In the following years we plan to issue the 1st standard edition of the Manual on cataloguing, which is going to be the revised and enriched preliminary edition, tested through everyday practice, then to frbrize the catalogue and intensify the work on the national cataloguing code, based on the experience, knowledge and practice in different European libraries as they progress with the implementation of RDA.

I have been discussing at length about descriptive cataloguing as if there are no problems with regards to subject cataloguing. Subject cataloguing is, of course, just as important and is not to be neglected. For defining the subject of the library material, UDC has been in use for a very long time. *Splošni slovenski spletni geslovník* (SSSG) is in use in public and school libraries in general and in the National and University Library, which mainta-

ins it. Different special thesauri are in use in scientific and academic libraries. IZUM is developing *Splošni geslovník COBISS* (SCG) and cooperates closely with the National and University Library. This project, I believe, is to be finished soon, too.

I am not a visionary, I do not have a crystal ball in my hand to foresee the future in cataloguing and how quickly the changes will happen. It all depends on us, on how quick we are, how brave we are and how eager we are to accept the changes and to adapt to them. During my career as a cataloguer I have learned to move forward with small steps: by doing so, the progress is steadier with fewer steps taken backwards.

Festina lente is the saying to be taken into consideration in order not to regret our decisions later.

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