

UNITED STATES PATENT AND TRADEMARK OFFICE

BEFORE THE PATENT TRIAL AND APPEAL BOARD

MICROSOFT CORPORATION
Petitioner

v.

X1 DISCOVERY, INC.
Patent Owner

U.S. Patent Nos. 7,370,035, 10,552,490, and 9,633,139

DECLARATION OF INGRID HSIEH-YEE, PH.D.

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I, Ingrid Hsieh-Yee, declare as follows:

I. INTRODUCTION AND QUALIFICATIONS

1. I am over the age of eighteen and otherwise competent to make this declaration.

2. I have been retained by counsel for Petitioner to provide my expert opinion in connection with the above-captioned proceeding (“IPR”) regarding the public availability of a certain prior art reference in relation to U.S. Patent Nos. 7,370,035 (the “‘035 patent”), 10,552,490 (the “‘490 patent”), and 9,633,139 (the “‘139 patent”).

3. I am being compensated for my time in connection with this IPR at my current consulting rate. I am also being reimbursed for any reasonable expenses associated with my work and testimony in this investigation. My compensation is not contingent on the results of my study, the substance of my opinions, or the outcome of this matter.

A. Qualifications and Professional Experience

4. My complete qualifications and professional experience are described in my academic curriculum vitae (**Appendix A**). The following is a brief summary of my relevant qualifications and professional experience.

5. I was a professor in the Department of Library and Information Science at the Catholic University of America for 32 years and was conferred the title of

Professor Emerita in December 2022. I have experience working in an academic library, a medical library, and a legislative library. I hold a Ph.D. and a Masters in Library and Information Studies from the University of Wisconsin-Madison.

6. I am an expert on library cataloging and classification and have published two editions on this subject, *Organizing Audiovisual and Electronic Resources for Access: A Cataloging Guide* (2000 and 2006). I taught a variety of courses, including Cataloging and Classification, Advanced Cataloging and Classification, Organization of Internet Resources, Organization of Information, Metadata, Digital Content Creation and Management, Internet Searches and Web Design, Information Literacy Instruction, Advanced Information Retrieval and Analysis Strategies, and The Information Professions in Society. I am familiar with metadata schema design and implementation. In my teaching, I covered the design and implementation of metadata in databases, search engines, digital repositories, digital libraries, and digital archives. I also covered how information organization affects the discovery and access to digital resources on the Internet. My research interests cover cataloging and classification, information organization, metadata, information retrieval, information architecture, digital collections, scholarly communication, social media, user interaction with information systems, and others.

II. BACKGROUND OF LIBRARY CATALOGING

A. Machine-Readable Cataloging (“MARC”)

7. I am very familiar with a library cataloging encoding standard known as the “Machine-Readable Cataloging” standard, also known as “MARC,” which became the national standard for sharing bibliographic data in the United States by 1971 and the international standard by 1973. MARC is the primary communications protocol for the transfer and storage of bibliographic metadata in libraries. Experts in my field reasonably rely upon MARC records when forming their opinions.

8. A MARC record consists of several fields, each of which contains specific data about the work. Each field is identified by a standardized, unique, three-digit code corresponding to the type of data that follows. **Appendix B** is a true and correct copy of Parts VII to X of “Understanding MARC Bibliographic: Machine-Readable Cataloging” (<https://www.loc.gov/marc/umb/um07to10.html>), a brief description and tutorial published by the Library of Congress in 2009 that explains commonly used MARC fields. For example, the personal author of a work is recorded in Field 100, the title is recorded in Field 245, publisher information is recorded in Field 260, the physical volume and characteristics of a publication are recorded in Field 300, and topical subjects are recorded in Fields 650. More details of MARC21 format for Bibliographic Data are available on the Library of Congress website at <https://www.loc.gov/marc/bibliographic/>.

9. I am very familiar with library cataloging and processing practices and the relationships between OCLC (Online Computer Library Center) and library catalogs, and how libraries create and share their records to help the public discover and access information.

10. OCLC is the largest bibliographic network of the world, and its WorldCat database contains more than 559 million records from thousands of member institutions (many of which are libraries of some type) in more than 100 countries. OCLC was founded in 1967 to promote and support library cooperation. According to the third article of the “Amended Articles of Incorporation of OCLC [Online Computer Library Center], Inc.,” OCLC was created “to establish, maintain, and operate a computerized library network and to promote the evolution of library use, of libraries themselves, and of librarianship, and to provide processes and products for the benefit of library users and libraries, including such objectives as increasing availability of library resources to individual library patrons and reducing the rate of rise of library per-unit costs, all for the fundamental public purpose of furthering ease of access to and use of the ever-expanding body of worldwide scientific, literary, and educational knowledge and information” (source: <https://www.oclc.org/content/dam/oclc/membership/articles-of-incorporation.pdf>).

11. OCLC members can contribute original cataloging records in MARC to the system or derive cataloging records from existing records, an activity referred

to as “copy cataloging.” When an OCLC participating institution acquires a work, it can create an original MARC record for the work in OCLC’s Connexion system (a system for catalogers to create and share MARC records), and the system will automatically generate a code for the date of record creation in the yymmdd format, and the creating library’s OCLC symbol is recorded in subfield “a” of the 040 field. Once the MARC record is in Connexion, it becomes available to other OCLC members for adoption to their local online catalogs (*i.e.*, copy cataloging).

12. After a MARC record is created in Connexion, it also becomes searchable and viewable on WorldCat.org, which is a free web portal for users to explore more than 10,000 libraries worldwide. Records in WorldCat.org, however, are not presented in MARC fields. Instead, the data elements are labeled to help users interpret the records. Thus, the information stored in MARC records in Connexion is available to the interested public through the user-friendly WorldCat web portal. WorldCat records can also be searched on OCLC FirstSearch, a subscription-based search system that provides access to many proprietary databases, including the WorldCat database.

B. Library Online Catalogs

13. Library online catalogs gained acceptance in the early 1980s and many libraries migrated their systems to the World Wide Web in the mid-1990s. Library online catalogs are based on MARC records that represent their collections in order

to help the public understand what materials are publicly accessible in those libraries. Most libraries with online catalogs have made their catalogs freely available on the Web. These online catalogs offer user-friendly search interfaces. Strong user interest in keyword searches and the popularity of Google have led to the “googlization” of library search systems. As a result, many library catalogs nowadays provide a single search box for users to conduct keyword searches, with additional support for searches by author, title, subject terms, and other data elements such as ISBN (International Standard Book Number). Library catalogs these days also offer features for users to narrow their search results by language, year, format, and other elements. Many libraries display MARC records on their online catalogs with labels for the data elements to help the public interpret MARC records. Many libraries also offer the option to display MARC records in MARC fields.

14. Libraries create MARC records for works they acquire, including books, serials, motion pictures, and publications in other formats. Monograph cataloging is fairly common in libraries, and most libraries make a newly cataloged monograph available to the public soon after the cataloging work is completed, usually within a week. Libraries can create original cataloging records or use an existing record in the OCLC WorldCat database to create a copy cataloging record. As soon as the cataloging record is completed, it is added to the library’s online catalog for users. If the record is an original record, it is also entered into the OCLC

system. If it is a copy cataloging record, the library's holding symbol is attached to the existing original record in the OCLC system to facilitate searching and interlibrary loan.

15. I am personally familiar with many online catalogs, databases, and search engines. In preparing for this declaration, I used the following authoritative information systems to search for records:

- Libraries.org, a directory of libraries throughout the world (<https://librarytechnology.org/libraries/>)
- Online catalog of the Fordham University Libraries (https://fdhm.ent.sirsi.net/client/en_US/default)
- Online catalog of the Library of Congress (<https://catalog.loc.gov/>)
- Public catalog of the US Copyright Office (<https://cocatalog.loc.gov/>)
- WorldCat.org (<https://search.worldcat.org/>)

C. Scope of this Declaration

16. I have been asked to offer an opinion on the public availability dates of the following document:

Londergan, S., & Freeland, P. (1999). *Lotus Notes R5 For Dummies Quick Reference*. Foster City, CA: IDG Books, **EX1061**
("Londergan").

17. I am informed by counsel and understand that a given reference is

“published” upon a satisfactory showing that such a document has been disseminated or otherwise made publicly available to the extent that persons interested and ordinarily skilled in the subject matter or art could locate it exercising reasonable diligence and obtain the document. I have also been informed by counsel and understand that materials available in a library constitute “printed publications” if they are catalogued and indexed according to general library practices and protocols that make the references available and accessible to members of the interested public.

18. I have been informed by counsel that the '035, '490, and '139 patents were filed in the United States and claim “September 3, 2002” as their earliest priority date. I have assessed public accessibility of the documents referenced below as of this claimed priority date.

19. I have been informed by counsel that the subject matter of this proceeding generally relates to search interfaces and engines .

20. I have been informed by counsel that a “person of ordinary skill in the art at the time of the invention” (POSA) is a hypothetical person who is presumed to be familiar with the relevant field and its literature at the time of the inventions. I have been informed by counsel that this hypothetical person is also a person of ordinary creativity, capable of understanding the scientific principles and literature applicable to the pertinent field.

21. I have been informed by counsel that a person of ordinary skill in the

art as of September 3, 2002 would have knowledge of the scientific literature and have skills relating to search interfaces and engines. A persons of ordinary skill in this subject matter or art would have had a bachelor's degree in computer science, or equivalent, with two or more years of experience developing and implementing search engines and/or search interfaces. I understand that more education, e.g., a Master's or Ph.D., would compensate for less work experience and vice versa.

22. It is my opinion that such a person would have been actively engaged in learning about the field, possibly through formal instruction and through bibliographic resources. By at least September 3, 2002, such a person would have had access to a vast array of print and electronic resources, including at least the documents referenced below.

D. Evidence Considered in Forming My Opinion

23. In the preparation of this declaration, I have reviewed **EX1061** referenced above, and any other documents I reference herein. Each of these is a type of material that experts in my field would reasonably rely upon when forming their opinions. I provided a further description of materials I considered in **Appendix C**.

III. Authenticity and Public Availability of *Londergan* (EX1061)

A. Authentication

24. **EX1061** is a true and correct copy of *Lotus Notes R5 For Dummies Quick Reference*, ("*Londergan*"), by Stephen Londergan and Pat Freeland, published

by IDG Books of Foster City, California in 1999, that I received from counsel. I understand from counsel that this copy was submitted as MICROSOFT EXHIBIT 1061 for the proceedings being considered. This copy of *Londergan* is presented as **EX1061** in this declaration.

25. Page 1 is the front cover of *Londergan* that shows the title, authors, and publisher. Page 2 is the title page that shows the same title, authors, and publisher as the cover, and includes the locations of the publisher. Page 3 is the copyright page that shows a “1999” copyright for this book, and the publisher IDG Books Worldwide, Inc. as the copyright holder. It also shows “99-62475” as the Library of Congress Catalog Card number, and “0-7645-0319-7” as the ISBN (International Standard Book Number) for this book. Page 4 is the About the Authors page, page 6 shows the Dedication and Authors’ Acknowledgments. Page 7 shows the Publisher’s Acknowledgments. Page 8 is the “Contents at a Glance” that shows this book includes eight parts, a glossary, and an index. Pages 9 to 14 are the Table of Contents that shows the topics covered by each part. **EX1061** shows the main text of *Londergan* runs from internal page 1 to page 184, followed by “Glossary: Techie Talk” (from internal pages [185] to 198), and an index (from internal page [199] to 208). Page 225 is the back cover that shows the “Reader Level” is “Beginning to Advanced,” the Computer Book Shelving Category is “PCs & Macs/Groupware/Lotus Notes” and the prices of this book in USA, Canada, and UK. It also shows the ISBN of this book.

26. To authenticate **EX1061**, I researched information on library holdings on WorldCat.org, the free web portal that “represents the world’s largest library community on the web with access to billions of items from thousands of libraries worldwide” (source: WorldCat.org at <https://www.oclc.org/en/worldcat-org.html>), and a record at <https://search.worldcat.org/title/42080406> showed Library of Congress held a copy of *Londergan*. After verifying the holdings information in the library system’s online catalog, I obtained a copy of the front matter of this book from the Library of Congress through a document vendor. This library copy is presented as **EX1061A** in this declaration.

27. **EX1061A** is a true and correct copy of the front matter of *Londergan*. Page 1 is the spine of a bound volume that shows the title, call number (“HF5548.4 .L692 L667 1999”) and a label of “CBN BRNH GenColl” that indicates this book is in the general collection at the Cabin Branch storage facility of the Library of Congress. Page 2 is the front cover, page 3 is the title page, page 4 is the copyright page that shows a hand-written call number, and a date stamp, page 5 is another scan of the copyright page with a greater contrast setting to show a date stamp of “Library of Congress MAY 20 1999 CIP” that indicates this copy was received by CIP (the Cataloging in Publication Program of the Library of Congress) on May 20, 1999. Page 6 shows the “Contents at a Glance” page, pages 7 to 12 show the Table of Contents, Page 13 shows the Index ends on internal page 208, page 14 shows the

back cover, and page 15 shows the back cover of the bound volume showing a Library of Congress barcode. I have closely compared the pages included in the Library of Congress copy (**EX1061A**) and found that, except for the Library of Congress bindings, the pages of *Londergan* are identical to their corresponding pages in **EX1061**, confirming the copy of *Londergan* at the Library of Congress and **EX1061** have the same content.

28. To further authenticate **EX1061**, I obtained a used copy of *Londergan* from the Amazon Marketplace. I have closely compared the used copy with **EX1061** and found them to have the same content. I have also compared the front matter of the used copy with that of **EX1061**, and found them to have the same title, authors, copyright date, Library of Congress Catalog Card number, ISBN, About the Authors page, Dedication, Authors' Acknowledgments, Publisher's Acknowledgments, Contents at a Glance, and Table of Contents. As evidence that the used copy and **EX1061** have the same content and front matter, I produced **EX1061B** that contains the front matter and select pages from the used copy. A difference in the front matter is that the used copy shows Wiley Publishing, Inc. as the publisher, while **EX1061** shows IDG Books as the publisher. The reason for this difference is that Wiley acquired IDG Books in August 2001, and took over the publishing of all titles from IDG Books as a result. While the publisher of *Londergan* changed in 2001, **EX1061** and the used copy show the same content and the same ISBN and Library of Congress

Catalog Card number. As evidence of the acquisition, I obtained from the LexisNexis database a news report of Wiley's acquisition of Hungry Minds (previously known as IDG Books) that was dated "August 13, 2001, Monday." This report is presented as **EX1061C** in this declaration. Page 1 shows the report is entitled "Debt relief For Dummies" in *Daily Deal* (New York, NY), and it has a "2001" copyright date with The Deal L.L.C. as the copyright holder. Page 1 also shows Peter Lauria is the author, and the article highlights shows "John Wiley & Sons rescues Hungry Minds Inc. by acquiring the 'For Dummies' books publisher." The report states that Hungry Minds was "previously known as IDG Books" and is "best known for its 'For Dummies' brand, which is built around the premise that its straightforward, easy-to-digest how-to content can turn even those lacking adequate brainpower into passable experts in a given field."

29. **EX1061** is in a condition that creates no suspicion about its authenticity. Specifically, this copy is not missing any intermediate pages, and there are no visible alterations to the document. **EX1061** has the same front matter as the Library of Congress copy (**EX1061A**), a copy that is in the custody of a national library. Furthermore, **EX1061** has the same content as a used copy I obtained (excerpts contained in **EX1061B**). Based on my review and analysis of **EX1061**, **EX1061A** and **EX1061B**, I see no reason to question the authenticity of **EX1061**.

B. Records of Library of Congress

30. To determine the public availability date of *Londergan*, I obtained records for this book from the online catalog of the Library of Congress. **EX1061D** is a true and correct copy of the bibliographic and MARC records for *Londergan*. I personally identified, located, and obtained these records. They are the type of records experts in my field would reasonably rely upon when forming their opinion.

31. Pages 1 and 2 of **EX1061D** are the bibliographic record that shows the title, authors, publisher, physical description, ISBN, LCCN (Library of Congress Control number), and subjects of *Londergan*. These details match the information presented in **EX1061**, confirming this record represents *Londergan*. The Item Availability area shows the Library of Congress holds two copies of this book and both are stored offsite, but users can request access at the Jefferson or Adams Building Reading Rooms, and the status of the copies is “Not Charged” (meaning available for user request).

32. Pages 4 to 6 are the MARC record for *Londergan*. The first six digits of Field 008 show the MARC record was created on “990406” (*i.e.*, April 6, 1999). Field 955 is a field for local cataloging activities, and it shows the initial record was created on “04-06-99” (*i.e.*, April 6, 1999), the book was sent to the cataloging unit on “07-26-99” (*i.e.*, July 26, 1999), and the last date for cataloging was “09-23-99” (*i.e.*, September 23, 1999). Subfields “a” and “c” of Field 040 show DLC created the

original record and entered it into OCLC's WorldCat database. According to the *Directory of OCLC Members* (<https://www.oclc.org/en/contacts/libraries.html>), "DLC" is the OCLC library symbol for the Library of Congress. Fields 008, 955, and 040 inform my opinion that the Library of Congress created a record for *Londergan* on April 6, 1999, and completed the record on September 23, 1999. Since the front matter of the Library of Congress copy of *Londergan* (EX1061A) carries a date stamp of "MAY 20 1999 CIP," it is my opinion that the record created on April 6, 1999, was a pre-publication record. After the CIP Program of the Library of Congress received the published book on May 20, 1999, it used the published copy to update and complete their record on September 23, 1999. A customary library practice is to process a newly cataloged monograph promptly for public access, usually within a week after the cataloging work is completed. My personal experience with the collections at the Library of Congress is that it can take one to three months for a newly cataloged monograph to become ready for public access. It is therefore my opinion that *Londergan* became publicly discoverable in the online catalog of the Library of Congress on April 6, 1999, when the pre-publication record was created, and the physical copy, after processing, became publicly accessible at the Library of Congress one to three months after the cataloging record was completed on September 23, 1999, meaning the book would become publicly accessible no later than December 23, 1999.

33. Field 010 shows the Library of Congress control number, Field 020 shows the ISBN, Field 100 shows the first author, Field 245 shows the title and authors, and Field 260 shows the publisher and a copyright date of 1999. Field 300 shows the front matter ends on page xiv, the last numbered page is page 208, and the book includes illustrations. Field 440 shows the series title is included to help users discover this work. Field 500 shows the book includes an index. Field 700 shows the second author is included in the MARC record to help users discover this work.

34. The subjects of this book are represented in Field 050 by a Library of Congress Classification (LCC) number of “HF5548.4.L692” that represents “Lotus Notes” (source: Library of Congress Classification, Schedule H, at https://www.loc.gov/aba/publications/FreeLCC/LCC_H2024TEXT.pdf), and in Field 082 by a Dewey Decimal Classification (DDC) number of “650./0285/46” with “650” representing “Management and auxiliary services” and “650.0285” representing “Computer applications” in this area. Subjects are also represented in Field 630 and Field 650 by five Library of Congress subject heading: Lotus Notes, Business |x Computer programs (“|x” indicates a topical subdivision), Database management |x Computer programs, Groupware (Computer software), and Electronic mail systems. These subject representations enable users to conduct subject searches to discover *Londergan*.

35. This MARC record (**EX1061D**) shows that Library of Congress created

a pre-publication record for *Londergan* on April 6, 1999, making this book discoverable in their online catalog from that date on. Interested users would be able to search for this book by LCCN, ISBN, authors, title, and series. They would also be able to conduct subject searches by the LCC number, DDC number, and the Library of Congress subject headings in the MARC record to discover this book. After the cataloging record was completed on September 23, 1999, the physical copy was processed and would become publicly accessible no later than December 23, 1999, at the Library of Congress.

36. As evidence that the Library of Congress had an online catalog in operation in 1999, I obtained a profile of the library at <https://librarytechnology.org/library/2263> from libraries.org, a directory of libraries throughout the world. I personally located, identified, and obtained this profile. It is the type of material experts in my field would reasonably rely upon when forming their opinions. This profile is presented as **EX1061E** in this declaration.

37. The Technology Profile on page 2 of **EX1061E** shows the Library of Congress began using Voyager as their online catalog in 1998, and changed to Folio – EBSCO Information in 2023. These dates mean that in 1999 interested users were able to use the Voyager system to search for and access *Londergan* at the Library of Congress.

C. Copyright Registration Record

38. **EX1061F** is a true and correct copy of the copyright registration record for *Londergan*. I personally located, identified, and obtained this record from the public catalog of the US Copyright Office. This is the type of record experts in my field would reasonably rely upon when forming their opinions.

39. The title, authors, publisher, publication location, copyright date, pagination, and copyright claimant match the information presented in **EX1061**, confirming this record represents *Londergan*. The Date of Publication field shows this book was published on “1999-05-07” (*i.e.*, May 7, 1999), and the Registration Number / Date field shows the book was registered with the US Copyright Office on “1999-08-24” (*i.e.*, August 24, 1999). The publication date aligns well with the “MAY 20 1999” date stamp in **EX1061A** and the dates in the Library of Congress MARC record (**EX1061D**) that show the library created an initial record on April 6, 1999, and completed the record on September 23, 1999.

D. Records of Fordham University Library

40. **EX1061G** is a true and correct copy of the bibliographic and MARC records for *Londergan*. I personally located, identified, and obtained these records from the online catalog of the Fordham University Library. They are the type of records experts in my field would reasonably rely upon when forming their opinions.

41. Pages 1 to 6 are the bibliographic record that shows the title, authors,

ISBN, publisher and copyright date, physical description, series title, index note, subjects, summary, author notes, and a detailed table of contents. The title, authors, ISBN, publisher and copyright date match the information presented in **EX1061**, confirming this record represents *Londergan*. The summary appears to be a description provided by the publisher and is the same as the summary on several booksellers' websites. The "Author Notes" and the table of contents show the same content that appears in the front matter of **EX1061**.

42. Page 6 is the MARC record, and the first six digits of Field 008 show the original record was created on "990630" (*i.e.*, June 30, 1999). Subfields "a" and "c" show "VYF" created the original record and entered it into the OCLC WorldCat database. According to the *Directory of OCLC Members* (<https://www.oclc.org/en/contacts/libraries.html>), "VYF" is the OCLC library symbol for Fordham University. Field 005 is a machine-generated field that automatically records the last time a MARC record was modified by the holding library, and Field 005 shows "19990630092905" (*i.e.*, June 30, 1999, at 9 a.m., 29 minutes, and 5 seconds) was the last time the Fordham University Library modified their record. It is useful to keep in mind that record modification can take place for many reasons, such as correcting typos or updating the record to reflect the latest cataloging practice. The key point is a record must exist first before it can be modified, meaning the date in Field 005 is usually the same as or later than a

cataloging date. Fields 008, 040, and 005 inform my opinion that the Fordham University Library created an original record for *Londergan* on June 30, 1999, and modified their record no later than June 30, 1999. It is therefore my opinion that *Londergan* became discoverable in the online catalog of the Fordham University Library on June 30, 1999. A customary library practice is to process a newly cataloged monograph promptly for public access, usually within a week after the cataloging work is completed. It is therefore my opinion that, after processing, the physical copy of *Londergan* would become publicly accessible at the Fordham University Library by July 7, 1999.

43. Field 020 shows the ISBN of *Londergan*, Field 100 shows the first author, Field 245 show the title, subtitle, and authors, Field 260 shows the publisher, publisher location, and copyright date, and Field 300 shows physical details. Fields 490, 830 and 700 show the series title and the second author are included to help users discover this work.

44. The subjects of this book are represented in Field 090 by a Library of Congress Classification (LCC) number of “HF5548.4.L692” that represents “Lotus Notes” (source: Library of Congress Classification, Schedule H, at https://www.loc.gov/aba/publications/FreeLCC/LCC_H2024TEXT.pdf), and in Field 630 and Field 650 by five Library of Congress subject heading: Lotus Notes, Business |x Computer programs (“|x” indicates a topical subdivision), Database

management |x Computer programs, Groupware (Computer software), and Electronic mail systems. These subject representations enable users to conduct subject searches to discover *Londergan*.

45. This MARC record (**EX1061G**) shows that the Fordham University Library created an original record for *Londergan* on June 30, 1999, making this book discoverable in their online catalog from that date on. Interested users would be able to search for this book by ISBN, authors, title, and series. They would also be able to conduct subject searches by the LCC number and the Library of Congress subject headings in the MARC record to discover this book. After the physical copy was processed, it would become publicly accessible no later than July 7, 1999, at the Fordham University Library.

46. As evidence that the Fordham University Library had an online catalog in operation in 1999, I obtained a profile of this library system at <https://librarytechnology.org/library/6926> from libraries.org, a directory of libraries throughout the world. This record is presented as **EX1061H** in this declaration.

47. The Technology Profile on page 2 of **EX1061H** shows this library system began using DRA as their online catalog in 1991, and changed to Symphony in 2003. These dates mean that in 1999 interested users were able to use DRA at this library system to discover and access *Londergan*.

E. Usage Records

48. Actual usage of a publication is reflected by reviews that make reference to it. **EX1061I** is a true and correct copy of a record for *Londergan* at <https://www.amazon.com/Lotus-Notes-Dummies-Quick-Reference/dp/0764503197> that I personally located, identified, and obtained from Amazon.com. Page 4 shows two reviews from verified customers were posted on April 4, 2001, and August 27, 2001.

F. Summary of My Opinion on *Londergan*

49. The copy of *Londergan* from counsel (**EX1061**) is authentic because it contains no signs to raise suspicion about its authenticity. The front matter of **EX1061** is the same as that of the Library of Congress copy (**EX1061A**), which is in the custody of a national library. In addition, **EX1061** has the same content as a used copy I obtained from the Amazon Marketplace, as shown by excerpts of the used copy (**EX1061B**). Furthermore, the topics covered by **EX1061** are the same as the topics in the detailed table of contents included in the bibliographic record of the Fordham University Library (**EX1061G**).

50. The copyright registration record for *Londergan* shows the book was published on May 7, 1999 (**EX1061F**). The MARC record of the Library of Congress (**EX1061D**) shows the library created a pre-publication record for *Londergan* on April 6, 1999, making this book discoverable in their online catalog from that date

on. After the book was published and received by the Library of Congress, catalogers of the library completed the cataloging record on September 23, 1999. After processing, the copy would become publicly accessible no later than December 23, 1999, at the Library of Congress. The MARC record of the Fordham University Library (**EX1061G**) shows the library created an original record for *Londergan* on June 30, 1999, making this book discoverable in their online catalog from that date on. After processing, the physical copy would become publicly accessible no later than July 7, 1999 at this library. Reviews on Amazon.com shows customers posted two reviews in April and August of 2001 of *Londergan*.

51. Based on the documents and records that I have analyzed, it is my opinion that *Londergan* became publicly accessible no later than July 7 1999, at the Fordham University Library, and the copy at the Library of Congress became publicly accessible no later than December 23, 1999. Reviews of this book show customers were able to use the book and post their reviews in 2001.

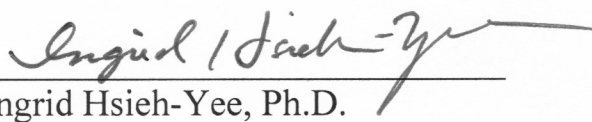
IV. Conclusion

52. In signing this Declaration, I recognize that the Declaration will be filed as evidence in a contested case before the Patent Trial and Appeal Board of the United States Patent and Trademark Office. I also recognize that I may be subject to cross-examination in this proceeding. If required, I will appear for cross-examination at the appropriate time.

53. I hereby declare that all statements made herein of my own knowledge are true and that all statements are made on information and belief are believed to be true, and further that these statements were made with the knowledge that willful false statements and the like so made are punishable by fine or imprisonment, or both, under 18 U.S.C. §1001.

Dated: **December 16, 2024**

Respectfully submitted,


Ingrid Hsieh-Yee, Ph.D.

APPENDIX A

Ingrid Hsieh-Yee
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Dept. of Library and Information Science
Catholic University of America
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Education

Ph.D. 1990. Library and Information Studies, University of Wisconsin-Madison
Minors: Sociology and Psychology

M.A. 1984. Library and Information Studies, University of Wisconsin-Madison.

M.A. 1983. Comparative Literature, University of Wisconsin-Madison.

B.A. 1980. Foreign Languages and Literature, National Taiwan University.

Work Experience

Professor, School/Dept. of Library and Information Science, Catholic University of America,
1990-2022 (Assistant Professor, 1990-1996; Associate Professor, 1997-2004; Professor
2004-2022; Professor Emerita 2022)

Co-Chair, Dept. of Library and Information Science, Catholic University of America, June 2015-
August 2016.

Acting Dean, School of Library and Information Science, Catholic University of America,
January 2010-June 2012.

Cataloger, Dept. of Legislative Reference Library, Annapolis, Maryland, 1989-1990.

Lecturer, School of Library and Information Studies, University of Wisconsin-Madison, 1988.

Teaching Assistant, School of Library and Information Studies, University of Wisconsin-
Madison, 1986-1988.

Cataloger, Health Sciences Library, University of Wisconsin-Madison, 1984-1986.

Areas of Teaching and Research Interests

Information Organization and Access; Metadata; Cataloging & Classification; Information
Architecture; Information Retrieval; Digital Collections; Social Media; Scholarly

Communication; Information Behavior; Health Informatics; Human Computer Interaction; Usability Studies

Grants & Honors

Cultural Heritage Information Management Project. IMLS grant. Amount: \$498,741. Period: Aug. 2012 to July 2015. Co-PI with Dr. Youngok Choi.

D.C. Health Information Technology (HIT4): Building Capacity & Providing Access in Our Nation's Capital. Dept. of Labor H2B Training Grant. Grant amount: \$4,175,500. Grant period: Nov. 2011 to Dec. 2015. Partner with the Metropolitan School of Professional Studies of the Catholic University of America, Children's National Medical Center, D.C. Department of Employment Services, Holy Cross Hospital, Howard University, Center for Urban Progress, Providence Hospital, and Sibley Memorial Hospital.

Capital Health Careers Project. Department of Labor Healthcare Sector and Other High Growth and Emerging Industries Grant. Grant amount: \$4,953,999. Grant period: March 2010 – February 2013. Awarded to a group of healthcare organizations and educational institutions in Washington, D.C. Providence Health Foundation of Providence Hospital (Lead institution). Part of the grant supported the development of a Master's degree program in Information Technology with a concentration in Health Information Technology offered by the School of Library and Information Science.

The Washington D.C. School Librarians Project. IMLS grant. Grant amount: \$412,660. Grant period: Aug. 2007 – June 2011. The School partnered with the District of Columbia Public Schools (DCPS) and the District of Columbia Library Association to educate and mentor school media specialists for the DCPS system. PI, Jan. 2010 to June 2011.

SIG Member of the Year, American Society for Information Science and Technology (2009).

Most Outstanding Paper of *OCLC Systems & Services* (2001).

ALISE Research Grant (2001).

Most Outstanding Paper of *OCLC Systems & Services* (2000).

Research Grant from ERIC (1999-2000).

Best Research Paper Award; Association for Library and Information Science Education (1998).

Research Grants, Catholic University of America. 1991, 1992, 1993, 1996, 1998, 1999, 2004, 2005, 2006, 2007, 2013-14.

Cooperative Faculty Research Grant, Consortium of Universities in the Washington Metropolitan Area (1993-1994).

Cooperative Research Grant, Council on Library Resources (1993-1994).

Journal of the American Society for Information Science Best Paper Award (1993).

ASIS/ISI Information Science Doctoral Dissertation Scholarship (1989).

HEA Title IIB Fellowship (Dept. of Education) (1989)

Chinese-American Librarians Association Scholarship (1987).

Beta Phi Mu (1985).

Vilas Fellowship, University of Wisconsin-Madison. 1984

Publications

Hsieh-Yee, I. (2021). Can We Trust Social Media? *Internet Reference Services Quarterly*, 1-15.
Published online: 28 July, 2021. 10.1080/10875301.2021.1947433.

Bailey, T., & Hsieh-Yee, I. (2020). Combating the Sharing of False Information: History, Framework & Literacy Strategies, *Internet Reference Services Quarterly*, 24 (1-2), 9-30.

Choi, Y., and Hsieh-Yee, I. (2010). Finding Images in an OPAC: Analysis of User Queries, Subject Headings, and Description Notes. *Canadian Journal of Information and Library Science*, 34(3): 271 – 295.

Hsieh-Yee, I. (2008). Educating Cataloging Professionals in a Changing Information Environment. *Journal of Education for Library and Information Science*, 46(2): 93-106.

Vellucci, S. L., Hsieh-Yee, I., and Moen, W.E. (2007). The Metadata Education and Research Information Commons (MERIC): A Collaborative Teaching and Research Initiative. *Education for Information*, 25(3&4): 169-178.

NISO Framework for Guidelines for Building Good Digital Collections. 3rd ed. Baltimore, MD: National Information Standards Organization, 2007. Also available online: <http://www.niso.org/framework/framework3.pdf> (NISO Working Group members: Priscilla Caplan (chair), Grace Agnew, Murtha Baca, Tony Gill, Carl Fleischhauer, Ingrid Hsieh-Yee, Jill Koelling, and Christie Stephenson.)

Choi, Y., Hsieh-Yee, I., and Kules, B. (2007). Retrieval Effectiveness of TOC and LCSH. *Proceedings of the Joint Conference on Digital Libraries*, pp. 233-234.

Vellucci, S., and Hsieh-Yee, I. (2007). They Didn't Teach Me That in Library School! Building

- a Digital Teaching Commons to Enhance Metadata Teaching, Learning and Research. *Proceedings of the National Conference of the Association of College and Research Libraries, Baltimore, MD*, pp. 26-31.
- Mitchell, Vanessa, and Ingrid Hsieh-Yee. (2007). Converting Ulrich's Subject Headings to FAST Headings: A Feasibility Study. *Cataloging & Classification Quarterly*, 45(1): 59-85.
- Hsieh-Yee, I., Tang, R., and Zhang, S. (2007). User Perceptions of a Federated Search System. *IEEE Technical Committee on Digital Libraries Bulletin*, Summer 3(2) (URL = <http://www.ieee-tcdl.org>).
- Tang, R., Hsieh-Yee, I., and Zhang, S. (2007). User Perceptions of MetaLib Combined Search: An Investigation of How Users Make Sense of Federated Searching." *Internet Reference Services Quarterly*, 12(12): 211-236.
- Hsieh-Yee, I., Tang, R., and Zhang, S. (2006). User Perceptions of a Federated Search System. *Proceedings of the Joint Conference on Digital Libraries, June 11-15, 2006, Chapel Hill*, p. 338.
- Hsieh-Yee, I. (2006). *Organizing Audiovisual and Electronic Resources for Access: A Cataloging Guide*. 2nd ed. Westport, Conn.: Libraries Unlimited.
- NISO *A Framework of Guidance for Building Good Digital Collections*. 2nd ed. Bethesda, MD: National Information Standards Organization, 2004. Framework Advisory Group: Grace Agnew, Liz Bishoff, Priscilla Caplan (Chair), Rebecca Gunther and Ingrid Hsieh-Yee.
- Hsieh-Yee, I. (2004). Cataloging and Metadata Education in North American LIS Programs. *Library Resources & Technical Services*, 48(1): 59-68.
- Hsieh-Yee, I. (2004). Cataloging and Metadata Education. In Gary E. Gorman (Ed.), *International Yearbook of Library and Information Management 2003: Metadata Applications and Management*, (pp.204-234). London: Facet Publishing.
- Yee, P. L., Hsieh-Yee, I., Pierce, G.R., Grome, R., and Schantz, L. (2004). Self-Evaluative Intrusive Thoughts Impede Successful Searching on the Internet. *Computers in Human Behavior*, 20(1): 85-101.
- Hsieh-Yee, I. (2003). Cataloging and Metadata Education: A Proposal for Preparing Cataloging Professionals of the 21st Century. A report submitted to the ALCTS-Education Task Force in response to Action Item 5.1 of the *Bibliographic control of Web Resources: A Library of Congress Action Plan*. Approved by the Association for Library Collections and Technical Services. Web version available since April 2003 at <http://lcweb.loc.gov/catdir/bibcontrol/CatalogingandMetadataEducation.pdf>.

- Hsieh-Yee, I. (2002). Cataloging and Metadata Education: Asserting a Central Role in Information Organization. *Cataloging & Classification Quarterly* 34(½): 203-222.
- Hsieh-Yee, I., and Smith, M. (2001). The CORC Experience: Survey of Founding Libraries, Part I. *OCLC Systems & Services*, 17: 133-140. (Received "The Most Outstanding Paper of OCLC Systems & Services in 2001" award.)
- Hsieh-Yee, I., and Smith, M. (2001). The CORC Experience: Survey of Founding Libraries, Part II, Automated Tools and Usage. *OCLC Systems & Services*, 17: 166-177. (Received "The Most Outstanding Paper of OCLC Systems & Services in 2001" award.)
- Hsieh-Yee, I. (2001). ERIC User Services: Changes and Evaluation for the Future. *Government Information Quarterly*, 18: 31-42.
- Hsieh-Yee, Ingrid. (2001). Research on Web Search Behavior. *Library and Information Science Research*, 23: 167-185.
- Logan, E., and Hsieh-Yee, I. (2001). Library and Information Science Education in the Nineties. *Annual Review of Information Science and Technology*, 35: 425-477.
- Hsieh-Yee, I. (Ed.) (2001). *Library and Information Science Research*, 23 (2). A special issue in honor of the retirement of Douglas L. Zweizig.
- Hsieh-Yee, I. (2000). *ERIC User Services: Evaluation in a Decentralized Environment*. Washington, D.C.: Dept. of Education.
- Hsieh-Yee, Ingrid. (2000). *Organizing Audiovisual and Electronic Resources for Access: A Cataloging Guide*. Littleton, CO: Libraries Unlimited.
- Hsieh-Yee, I. (2000). Organizing Internet Resources: Teaching Cataloging Standards and Beyond. *OCLC Systems & Services*, 16: 130-143. (Received "The Most Outstanding Paper of OCLC Systems & Services in 2000" award.)
- Hsieh-Yee, I. (1998). The Retrieval Power of Selected Search Engines: How Well Do They Address General Reference Questions and Subject Questions? *Reference Librarian*, 60: 27-47.
- Hsieh-Yee, I. (1998). Search Tactics of Web Users in Searching for Texts, Graphics, Known Items and Subjects: A Search Simulation Study. *Reference Librarian*, 60: 61-85. (Received the 1997 Best ALISE Research Paper Award.)
- Hsieh-Yee, I. (1997). Access to OCLC and Internet Resources: LIS Educators' Views and Teaching Practices. *RQ*, 36: 569-86.

- Hsieh-Yee, I. (1997). Teaching Online and CD-ROM Resources: LIS Educators' Views and Practices. *Journal of Education for Library and Information Science*, 38: 14-34.
- Hsieh-Yee, I. (1996). The Cataloging Practices of Special Libraries and Their Relationship with OCLC. *Special Libraries*, 87: 10-20.
- Hsieh-Yee, I. (1996). Modifying Cataloging Practice and OCLC Infrastructure for Effective Organization of Internet Resources. In *Proceedings of the OCLC Internet Cataloging Colloquium*. [Online]. Available: <http://www.oclc.org/oclc/man/colloq/hsieh.htm>
- Hsieh-Yee, I. (1996). Student Use of Online Catalogs and Other Information Channels. *College & Research Libraries*, 57: 161-175.
- Hsieh-Yee, I. (1995). Ten entries in James S. C. Hu (Ed.), *Encyclopedia of Library & Information Science*, 913, 1028-29, 1036, 1037, 1145-46, 1514, 1575, 1763-64, 2216-27, 2378-79. Taipei, Taiwan: Sino-American Publishing. (Topics include "Advanced Technology/Libraries," "Information Ethics," "Instruction on Cataloging and Classification," "Instruction on Reference Services.")
- Hsieh-Yee, I. (1993). Effects of Search Experience and Subject Knowledge on Online Search Behavior: Measuring the Search Tactics of Novice and Experienced Searchers. *Journal of the American Society for Information Science*, 44: 161-174. (Received the 1993 Best JASIS Paper Award.)

Works in Progress

- Hsieh-Yee, I. Actionable lessons for debunking false information: A comparative analysis of literacy lessons in communication and library and information science
- Hsieh-Yee, I. Representing diverse voices and communities in cataloging and indexing: The evolution of controlled vocabularies
- Hsieh-Yee, I. Information Organization and Retrieval in Practice (a monograph scheduled for completion and publication in 2023)

Presentations

- Bailey, T. & Hsieh-Yee, I. (February 2020). The Phenomena of Sharing Misinformation and the Need for Information Literacy. Presented at the 2020 Bridging the Spectrum Symposium, Washington, D.C., February 14, 2020.

- Hsieh-Yee, I. and Fragan-Fly, J. (May 2018) Trends, Design & Strategies for Digital Scholarship Services. Presented at the 2018 Maryland/Delaware Library Association Conference, Cambridge, MD.
- Hsieh-Yee, I. (February, 2018) Research Data Management: What It Takes to Succeed. Presented at the 10th Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee, I. (February, 2017) *Research Data Management: New Competencies and Opportunities for Information Professionals*. Presented at the 9th Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee, I. and Lawton, P. (February, 2017) *Enhancing Catholic Portal Searches with User Terms and LCSH*. Presented at the 9th Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee, I. (2016, October) *Visualizing Data for Information*. Presented at the 2016 Virginia Library Association Conference, Hot Springs, VA.
- Hsieh-Yee, I. (2016, August) *Religious Materials Toolbox for Archivists: Solutions to Problems Facing the Profession*. Presented at Archives * Records 2016, Atlanta, GA.
- Hsieh-Yee, I. and Lawton, P. (2016, March) *Enhancing Retrieval of Catholic Materials with LCSH Knowledge Structure*. Presented at the 2016 Catholic Library Association Conference, San Diego, CA.
- Fagan-Fry, J. and Hsieh-Yee, I. (2016, February) *Approaches to Digital Scholarship at Top Universities around the World: Scholarly Publishing in the Digital Age*. Presented at the 8th Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee and Fagan-Fry, J. (2016, January) *Innovative Services for Digital Scholarship at Top 100 Research Libraries of the World*. Poster presented at the 2016 Annual Conference of the Association for Library and Information Science Education, Boston, Mass.
- Hsieh-Yee, I. and Lawton, P. (2015, June). *Crowdsourcing terms for CRRA portal themes*. Poster presented at the third CRRA symposium and annual meeting, Bringing the created toward the Creator: Liturgical art and design since Vatican II. Catholic Theological Union, Chicago, Illinois.
- Hsieh-Yee, I. and Lawton, P. (2015, February). *Crowdsourcing terms for thematic exploration in the Catholic Portal*. Poster presented at the 7th Annual Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee, I., James, R., and Fagan-Fry, J. (2015, February). *Support for digital scholarship at top university libraries of the world*. Poster presented at the 7th Annual Bridging the Spectrum Symposium, Washington, D.C.

- Hsieh-Yee, I., Zhang, S., Lin, K., and Cherry, S. (2015, February). *Thus said the end users: Summon experience and support for research workflows*. Poster presented at the 7th Annual Bridging the Spectrum Symposium, Washington, D.C.
- Yontz, E., Hsieh-Yee, I., & Houston, S. (2015, February). *Healthy Heroes Summer Reading Club: Developing healthy youth at public libraries*. 11th Annual Jean Mills Health Symposium, Greenville, North Carolina.
- Yontz, E., Hsieh-Yee, I., and Houston, S. (2015, January). *Healthy youth and libraries: A pilot study*. Association for Library & Information Science Education (ALISE) Annual Conference, Chicago, Illinois.
- Hsieh-Yee, I. (2014, May). *Linking CRRRA resources to portal themes via authority files*. Presented at the Catholic Research Resources Alliance 2014 Membership Meeting, Marquette, WI.
- Hsieh-Yee, I. (2014, April). *Enhancing subject access to CRRRA resources*. Presented at the 2014 Catholic Library Association Conference, Pittsburgh, PA.
- Hsieh-Yee, I. (2014, January). *Health Information Technology Program: Educational entrepreneurship in action*. Presented at the 2014 annual Conference of the Association for Library and Information Science Education, Philadelphia, PA.
- Hsieh-Yee, I., Zhang, S., Lin, K., and Cherry, S. (2014, January). *Discovering information through Summon: An analysis of user search strategies and search success*. Paper presented at the 6th Bridging the Spectrum Symposium, Washington, D.C.
- Hsieh-Yee, I. (2012, December). *National Digital Stewardship Alliance and SLIS at CUA: An Educational Partnership*. Paper presented at Best Practices Exchange: Acquiring, Preserving, and Providing Access to Government Information in the Digital Era, Annapolis, MD.
- Choi, Y. and Hsieh-Yee, I. (2010, January). *Finding Images in an OPAC: Analysis of User Queries, Subject Headings, and Description Notes*. Paper presented at 2nd Annual Bridging the Spectrum Symposium, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I. and Coogan, J. (2010, January). *Google Scholar vs. Academic Search Premier: What Libraries and Searchers Need to Know*. Paper presented at 2nd Annual Bridging the Spectrum Symposium, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I. (2009, November). *Information Science Education: An LIS School's Perspective*. Paper presented at Annual Meeting of the American Society for Information Science and Technology, Vancouver, British Columbia, Canada.

- Hsieh-Yee, I., Menard, E., Ya-Ning Chen, A., Shu-Jiun Chen, S., Kalfatovic, M. R., Wisser, K. M. (2009, November). *Information Organization in Libraries, Archives and Museums: Converging Practices and Collaboration Opportunities*. Presented at Annual Meeting of the American Society for Information Science and Technology, Vancouver, British Columbia, Canada. (Organizer and moderator of this panel.)
- Hsieh-Yee, I. and Coogan, J. (2009, July). *Catching up to Google Scholar: The Retrieval Power of Academic Search Premier and Google Scholar*. Poster presented at American Library Association Conference, Chicago, Illinois.
- Hsieh-Yee, I., with the CUA Scholarly Communications Project Team. (2009, January). *Digital Scholarship@CUA: Developing an Institutional Repository for CUA*. Poster presented at 1st Annual Bridging the Spectrum Symposium, Catholic University of America, Washington, D.C.
- Wise, M., Cylke, K., and Hsieh-Yee, I. (2009, January). *Digital Talking Books: Meeting the Needs of the Blind and the Handicapped*. Paper presented at the Bridging the Spectrum Symposium, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I. (2009, January). *User Expectations of MERIC*. Presented at the Information Organization Competencies for the 21st Century Discussion Session of the 2009 Conference of the Association for Library and Information Science Education, Denver, Colorado.
- Choi, Y., and Hsieh-Yee, I. (2008, November). *Subject Access for Images in an OPAC*. Annual Meeting of the American Society for Information Science and Technology, Columbus, Ohio. (Also co-organized a panel on Retrieving and Using Visual Resources: Challenges and Opportunities for Research and Education.)
- Hsieh-Yee, I. (2008, June). *Educating Cataloging Professionals in a Changing Information Environment*. National Taiwan University, Taipei, Taiwan.
- Vellucci, S. L., Moen, W.E., Hsieh-Yee, I., Marson, B., and Wisser, K. (2008, January) *Building a Metadata Education and Research Community through MERIC (Metadata Education and Research Information Commons): Demo and Stakeholder Input*. A panel presented at the 2008 Conference of the Association for Library and Information Science Education, Philadelphia, Pennsylvania.
- Hsieh-Yee, I., Choi, Y. and Kules, B. (2007, October). *Searching for Books and Images in OPAC: Effects of LCSH, TOC and Subject Domains*. A poster presented at the American Society for Information Science and Technology Annual Meeting, Milwaukee, Wisconsin.
- Hsieh-Yee, I. and Coogan, J. (2007, August) *Google Scholar vs. Academic Search Premier: A Comparative Analysis*. Presented to the Faculty and Staff of the University of the District

of Columbia.

- Hsieh-Yee, I. and Coogan, J. (2007, June). *Google Scholar vs. Academic Search Premier: A Comparative Analysis*. Presented to the Washington Research Library Consortium Community, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I., Choi, Y., and Kules, B.. (2007, June). *What Users Need for Subject Access: Table of Contents or Subject Headings?* A poster presented at the 2007 American Library Association Annual Conference, Washington, D.C., June 2007.
- Choi, Y., Hsieh-Yee, I., and Kules, B. (2007, June). *Retrieval Effectiveness of TOC and LCSH*. A paper presented at the Joint Conference on Digital Libraries 2007, Vancouver, Canada.
- Vellucci, S. L., Hsieh-Yee, I., and Moen, W.E. (2007, May). *If We Build It, Will They Come? Building a Community of Practice for Metadata Stakeholders*. A poster presented at the Rutgers University Research Day, Bridgeton, New Jersey.
- Hsieh-Yee, I. (2007, May). *Federated Searching: User Experience & Perceptions*. International Conference on Information Organization & Retrieval, National Taiwan University, Taipei, Taiwan.
- Hsieh-Yee, I. (2007, May). *Search Performance of Google Scholar and Academic Search Premier*. International Conference on Information Organization & Retrieval, National Taiwan University, Taipei, Taiwan.
- Hsieh-Yee, I. (2007, May) *MERIC: Building a Digital Commons for Metadata Education & Research*. International Conference on Information Organization & Retrieval, National Taiwan University, Taipei, Taiwan.
- Hsieh-Yee, I., and Coogan, J. (2007, March/April). *A Comparative Analysis of Google Scholar and Academic Search Premier*. Poster presented at the Association of College & Research Libraries 13th National Conference, Baltimore, Maryland.
- Vellucci, S. L. and Hsieh-Yee, I. (2007, March/April) *They Didn't Teach Me That in Library School! Building a Digital Teaching Commons to Enhance Metadata Teaching, Learning and Research*. On-site presentation and Webcast by Elluminate. A contributed paper presented at the Association of College & Research Libraries 13th National Conference, Baltimore, Maryland. The acceptance rate for contributed paper was 20%. This paper was one of 10 conference papers chosen for live webcast during the conference.
- Moen, W., Hsieh-Yee, I. and Vellucci, S.L. (2007, January) *A DSpace Foundation for a Teaching & Research Commons: The Metadata Education and Research Information Commons*. A poster session presented at the Open Repositories Conference 2007, San Antonio, Texas.

- Tang, R., Hsieh-Yee, I., and Zhang, S. (2006, November) *User Perception of MetaLib Combined Search*. Paper presented at the Annual Meeting of the American Society for Information Science and Technology, Austin, Texas, Nov. 2006.
- Hsieh-Yee, I. (2006, November). *Federated Searching: User Perceptions, System Design, and Library Instructions*. Paper presented at the Annual Meeting of the American Society for Information Science and Technology, Austin, Texas. (Panel organizer, moderator, presenter).
- Hsieh-Yee, I. (2006, November). *Building a Digital Teaching Commons to Enhance Teaching and Learning: The MERIC Experience and Challenges*. Paper presented at the Annual Meeting of the American Society for Information Science and Technology, Austin, Texas. (Panel organizer, moderator, presenter)
- Hsieh-Yee, I. (2006, September). *Search Performance of Google Scholar and Academic Search Premier*. Paper presented at the ERIC Publishers Meeting, Washington, D.C.
- Hsieh-Yee, I., Zhang, S., and Rong Tang, R. (2006, June). *User Perceptions of a Federated Search System*. Poster presented at Joint Conference on Digital Libraries, Chapel Hill, North Carolina.
- Hsieh-Yee, I. and Zhang, S. (2006, June). *Preparing Users for Federated Search: Implications of a MetaLib User Perceptions Study*. Paper presented at the 2006 Ex Libris User Groups of North America Conference, Knoxville, Tennessee.
- Hsieh-Yee, I. (2006, January). *MERIC Organizations and Navigation*. Paper presented at the 2006 ALISE Annual Conference, San Antonio, Texas.
- Hsieh-Yee, I. (2006, January). *Metadata and Cataloging Education: Recommended Competencies*. Paper presented at the 2006 ALISE Annual Conference, San Antonio, Texas.
- Hsieh-Yee, I. (2005, November). *Digital Library Evaluation: Progress & Next Steps*. Presentation at the Annual Meeting of the American Society for Information Science & Technology, Charlotte, North Carolina.
- Hsieh-Yee, I. (2005, August). *Providing Access to Digital Content: Issues for DL Managers*. Presentation at MDK12 Digital Library Steering Committee Meeting, Columbia, Maryland.
- Hsieh-Yee, I. (2005, April). *Enhancing Teaching and Learning: The Role of School Library Media Specialists*. Presentation at Meeting of the Baltimore County Public School System School Media Specialists, Baltimore, Maryland.

- Hsieh-Yee, I. (2005, January). *Subject Access and Users: Insights & Inspirations from Marcia J. Bates*. Paper presented at the Historical Perspectives SIG, 2005 Conference of the Association for Library and Information Science Education, Boston, Massachusetts.
- Hsieh-Yee, I. (2005, January). *Electronic Resource Management: Practice, Employer Expectations, & CE Interests*. Paper presented at Technical Services Education SIG, 2005 Conference of the Association for Library and Information Science Education, Boston, Massachusetts.
- Hsieh-Yee, I. (2004, October). *Library Professionals for the Digital Age: Competencies & Preparation*. Paper presented at Bibliographic Access Management Team meeting, Library of Congress, Washington, D.C.
- Hsieh-Yee, I. (2004, January). *Cataloging and metadata expertise for the digital era*. Presented at Preparing 21st Century Cataloging and Metadata Professionals: A Workshop for Educators and Trainers, San Diego and sponsored by ALCTS, ALISE, LC, and OCLC.
- Hsieh-Yee, I. (2004, January). *Educating catalogers for the digital era*. Paper presented at the Technical Services SIG, 2004 Conference of the Association for Library and Information Science Education, San Diego.
- Hsieh-Yee, I. (2003, July). *Cataloging Education for the 21st Century*. A presentation at the Library of Congress, Washington, D.C.
- Hsieh-Yee, I. (2002, January) *Metadata Education and Research Priorities: A Delphi Study of Metadata Experts*. Presentation at the 2002 Conference of the Association for Library and Information Science Education, New Orleans.
- Hsieh-Yee, I. (2001, November). *A Delphi Study of Metadata: Preliminary Findings*. Poster session at the 2001 Annual Meeting of the American Society for Information Science & Technology, Washington, D.C.
- Hsieh-Yee, I. (2001, June). *Resources on Asian American Children: Analysis of Retrieval by Search Engines and WorldCat*. Presentation at the National Conference on Asian Pacific American Librarians, San Francisco.
- Hsieh-Yee, I. (2001, January). *Delphi Study on Metadata: Project Design*. Presentation at Research Awards Session, Association for Library & Information Science Education, Washington, D.C.
- Hsieh-Yee, I. (2000, May). *Web Search Behavior Research: Progress and Implications*. Presentation at the Symposium on Evaluating Library and Information Science Research, University of Wisconsin-Madison, Madison, Wisconsin.

- Hsieh-Yee, I. (2000, March). *ERIC User Services: Evaluation in a Decentralized Environment*. Presentation at the National ERIC Joint Directors/Technical Meeting, Arlington, Virginia.
- Hsieh-Yee, I. (2000, January). *Enhancing Learning with Web Technology*. Presentation at Faculty Conversations, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I. (2000, January). *From Surrogates to Objects: CUA's Approaches to Organizing Electronic Resources*. Paper presentation at the Annual Conference of the Association for Library and Information Science Education, San Antonio, Texas.
- Yee, P., and Hsieh-Yee, I. (1997, November). *Individual Differences in Search Behavior on the WWW*. A poster session presented at the 38th Annual Meeting of the Psychonomic Society, Philadelphia, Pennsylvania.
- Hsieh-Yee, I. (1997, April). *Research + Marketing + Preparation = Job!* Presented at the "Workshop on Resume and Interview Techniques," Special Libraries Association, Student Chapter, Catholic University of America, Washington, D.C.
- Hsieh-Yee, I. (1997, February). *Creating CyberCatalogers: Education and Training*. Presentation at ALA's Midwinter Meeting, Washington, D.C.
- Hsieh-Yee, I. (1997, February). *Search Tactics of Web Users in Searching for Texts, Graphics, Known Items and Subjects: A Search Simulation Study*. Presented at the Conference of the Association for Library and Information Science Education, Washington, D.C.
- Hsieh-Yee, Ingrid. "Beginning Your Special Library/Information Center Career." Presented at SLA's "Career Day," Jan. 11, 1997, Catholic University of America.
- Hsieh-Yee, I. (1996, September). *The Roles of Library and Information Scientists in Managing Electronic Information*. Presentation at Hamilton College, Clinton, New York.
- Hsieh-Yee, I. (1996, May). *The Future of Cataloging as a Profession*. Presented at "The Cataloging Forum, Library of Congress, Washington, D.C.
- Hsieh-Yee, I. (1994, October). *The Impact of the Internet on OPACs*. Presented at the Third Workshop on User Interfaces for OPACs, Library of Congress, Washington, D.C.

Reports

- Hsieh-Yee, I., with Knowledge Management Competencies and Performance Action Group of the Federal Knowledge Management Initiative. "From Knowledge Management Competencies to Improved Organizational Performance." April 9, 2009.

- Hsieh-Yee, I., with Knowledge Practices Action Group of the Federal Knowledge Management Initiative. "KM Practice in Government Agencies: Findings and Recommendations." April 9, 2009.
- Hsieh-Yee, I. "Delphi Study on Metadata." 2001. Three quarterly reports submitted to the Association for Library and Information Science Education.
- Hsieh-Yee, I. "College Students' Information Channels: Patterns of Use and Possible Factors in Channel Selection." 1995. Submitted to the Catholic University of America.
- Hsieh-Yee, I. "The Information-Seeking Patterns of Scholars and Their Use of an Online Information System." 1994. Submitted to the Council on Library Resources.

Book Reviews

- Review of *The Measurement and Evaluation of Library Services*, by Sharon L. Baker and F. Wilfrid Lancaster. *Information Processing and Management* 30 (1994): 450-52.
- Review of *Subject Access to Films and Videos*, by Sheila S. Intner and William E. Studwell; and *Cataloging Unpublished Nonprint Materials*, by Verna Urbanski with Bao Chu Chang and Bernard L. Karon. *Information Processing and Management* 30 (1994): 449-50.
- Review of *Automated Information Retrieval in Libraries: A Management Handbook*, by Vicki Anders. *Journal of Library and Information Science* 19 (1993): 98-100.
- Review of *Full Text Databases*, by Carol Tenopir and Jung Soon Ro. *Information Processing and Management* 28 (1992): 667-68.
- Review of *Descriptive Cataloging for the AACR2R And USMARC: A How-to-Do It Workbook*, by Larry Millsap and Terry Ellen Ferl. *Information Processing and Management* 28 (1992): 809-11.
- Review of *MARC Manual: Understanding and Using MARC Records*, by Deborah J. Byrne. *Information Processing and Management* 28 (1992): 537-38.

Service

Professional Associations and Societies

- Library of Congress. RDA Training Program for the Profession. Co-authored with Tim Carlton. 2013-2014.
- 2014 Digital Preservation Outreach & Education Survey. Contributed to the design of the survey, 2014.
- National Digital Stewardship Alliance. Outreach Committee. 2011-2014.
- National Digital Stewardship Residency Program. Advisory Group, 2012-2013.
- FEDLINK Health Information Technology Advisory Council, 2011-2015.

- 2012 Joint Conference on Digital Libraries. Program Planning Committee, Pre-Conference Proposals Review Committee, 2012
- Catholic Research Resources Alliance. Five-Year Strategic Plan Task Force, 2011-2012
- Institute of Museum and Library Services. Grant reviewer. 2004, 2005, 2010.
- Association for Library and Information Science Education.
 - * ALISE Bodan Wynar Research Paper Award Committee, 2015, 2016, 2017
 - * ALISE Eugene Garfield Dissertation Award Competition, Jury, 2013, 2014
 - * ALISE Research Grant Competition Committee. Chair, 2012
 - * Pratt-Severn Faculty Innovation Award. Chair, 2009, 2010
 - * ALISE Doctoral Poster Jury, 2012
 - * “Information Organization Competencies for the 21st Century” Discussion session leader. 2009 Conference of the Association for Library and Information Science Education.
 - * Assisted Technical Services SIG Convener in organizing a program, “Building a Metadata Education and Research Community through MERIC (Metadata Education and Research Information Commons): Demo and Stakeholder Input” for the 2008 ALISE conference.
 - * Association for Library Collections and Technical Services/Association for Library and Information Science Education (ALCTS/ALISE) Metadata Education and Research Information Center (MERIC) Advisory Board, Co-Chair (with Sherry Vellucci), 2005-2007. Chair, 2008-2009 (leading the effort to build MERIC, a repository and collaborative space for metadata educators, practitioners, and researchers)
 - * Technical Services SIG, Convener, 2004-2005. Organized a program on “Electronic Resources Management: Current Practices, Employer Expectations, and Teaching Strategies” for the 2005 conference in Boston, Massachusetts.
 - * Technical Services SIG, Convener, 2003-2004. Organized a program on “Organizing Information with Metadata: Desired Competencies and Teaching Innovations” for the 2004 conference.
 - * Technical Services SIG, Convener, 1999-2000. Organized a program on "Teaching the Organization of Electronic Resources" for the 2000 conference.
 - * Curriculum SIG, Co-convener (with Sibyl Moses), 1996-97. Organized a program on “Government Information Policy” for the 1997 conference.
- American Society for Information Science & Technology.
 - * Reviewer, Conference program panel submissions and poster submissions, 2005, 2006, 2007, 2009, 2011, 2012, 2013, 2014, 2015, 2016, 2017
 - * Nomination Committee, 2009-2011
 - * Information Science Education Special Interest Group. American Society for Information Science and Technology. Chair-Elect, 2007-2008. Chair 2008-2009.
 - * Committee on Information Science Education. 1999-2006.
 - * Committee on Information Science Education. Organizing Committee for an orientation program for students at ASIS annual meetings, 1999-2001
 - * Committee on Information Science Education. Sub-committee on Student Welfare (focusing on issues related to master's education), 1998-2001

- * SIG ED. Organizing Committee for the "Seminar on Research and Career Development" for junior researchers. 1995-96 (chair), 1997-2001
- * ISI Doctoral Dissertation Proposal Scholarship Jury, 1997; 2001, 2002
- * Pratt-Severn Best Student Research Paper Award Jury. Chair. 1997
- * 1998 Midyear Meeting (referee of contributed papers), 1997
- * Organizer and moderator of the ASIS Doctoral Forum and the Doctoral Research Seminar 1994-1995
- * SIG Human Computer Interaction. Chair-Elect, Chair, 1993-1995
- * Doctoral Forum Award Jury, 1995
- * Best Student Paper Award Jury, 1995
- American Library Association.
 - * Committee on Accreditation, External Review Panelist, 2009- (site visiting team 2013-2014; site visiting team 2016-2017)
 - * Association for Library Collections and Technical Services Task Force on Competencies and Education for a Career in Cataloging, member, 2008-2009
 - * Facilitator for "What They Don't Teach in Library School: Competencies, Education and Employer Expectations for a Career in Cataloging," an Association for Library Collections and Technical Services Preconference, June 22, 2007 in Washington, D.C. Also a local liaison for bringing this program to the Catholic University of America.
 - * Facilitator for a discussion on "Effect of Electronic Resources on Technical Services" at ALA's Midwinter Meeting held in Feb. 1997 in Washington, D.C.
 - * International Relations Committee, Subcommittee Task Force for IFLA and China, 1994-1997
- Virginia Association of School Librarians. Scholarships and Awards Committee. 2010-2012
- Federal Knowledge Management Initiative, Knowledge Management Practices Action Group. Member. 2009 (leading the effort to build a knowledge management repository)
- Federal Knowledge Management Initiative, Knowledge Management Competencies & Learning Action Group. Member. 2009 (developing an action plan for helping government knowledge workers and government agencies to develop knowledge management competencies)
- National Center for Education Statistics. Technical Review Panel. 2008.
- External evaluator for a case of promotion to full professorship. University of Tennessee. 2008.
- National Information Standards Organization (NISO). Advisory Board, Revision of "IMLS Framework of Guidance for Building Good Digital Collections," 2004, 2007.
- Library of Congress, Bibliographic Control of Web Resources: A Library of Congress Action Plan. Principal Investigator of Action Item 5.1, focusing on cataloging and metadata education for students and new librarians, 2002-2003. (worked with the Association for Library Collections and Technical Services, Education Task Force)

- Chinese American Librarians Association
 - * Chinese American Librarians Association Outstanding Library Leadership Award in Memory of Dr. Margaret Chang Fung, Award Committee, 2016-2017
 - * Achievement Award Jury, 2000-2001
 - * CALA Goal 2000 Task Force, 1997
 - * Scholarship Committee, 1995, 1996-1997 (chair)
 - * Board of Directors, 1994-1997
 - * Publication Committee, 1993-1995
 - * International Relations Committee, 1993-1996
- SailorSM Assessment Advisory Group (An impact study of Sailor, Maryland's Public Information Network), 1995
- Editorial boards
 - Journal of Library & Information Science. Editorial Board, 2012-
 - Chinese American Librarians Association, *Occasional Papers Series*. Editorial Board, 2009-2016.
 - Library Quarterly*. Editorial Board, 2003-2008
 - Bulletin of the Medical Library Association*, 1994-97
 - Newsletter editor for the Chinese American Librarians Association, 1989-92
- Referee for the following journals
 - Information Processing and Management*
 - Journal of Digital Information*
 - Journal of Education for Library and Information Science*
 - Journal of Information Science*
 - Journal of Library & Information Science*
 - Journal of Library Metadata*
 - Journal of the American Society for Information Science & Technology*
 - Library and Information Science Research*
 - Library Quarterly*
- Expert reviewer, “Digital Library” course, Evaluation module, University of North Carolina, Chapel Hill, 2007-2008.
- Expert reviewer, “Information Organization” course, University of Michigan, Ann Arbor. 2007.

Catholic University of America

- Academic Senate Committee on Appointments and Promotions, 2005-2008
- Academic Senate Committee on Committees and Rules, 2009-2012, 2019-2022
- Academic Senate representative (for School of Arts & Sciences), 2017-2020

- Academic Senate representative (for School of Library & Information Science) 2003-2012
- Academic Senate Library Committee, Interim Chair (2007), Member, 2008-2012
- Academic Senate Committee on Computing, 1995-2003
- President's Administrative Council, 2010-2012
- Deans' Council, 2010-2012
- Academic Leadership Group, 2010-2012
- Graduate Board, 2010-2012
- School of Arts & Sciences, Committee on Appointments and Promotions, 2015-2019
- School of Arts & Sciences, Academic Council, 2015-2016.
- School of Arts & Sciences, Ordinary Professor Group, 2013-
- Doctoral Dissertation Defense Committee, Chair, Dept. of Psychology, 2016, 2017, 2018, 2019, 2020, 2021, 2022
- Doctoral Dissertation Defense Committee, Chair, Dept. of Education, 2014, 2015, 2017, 2018, 2019
- Doctoral Dissertation Defense Committee, Chair, National Catholic School of Social Services, 2019, 2020, 2021
- Doctoral Dissertation Defense Committee, Chair, School of Nursing, 2006, 2008
- CUA Scholarly Communication Project Team, Member (2007), Chair, 2008-2009
- Dean Search Committee, 1992-1994, 1998-1999, 2002-2003, 2006-2007
- Fulbright Review Panel, 2006
- CUA Service Learning Advisory Board, 2001-2002
- CUA Faculty Conversations on Enhancing Teaching and Learning through Technology, Planning Group, 1999-2001
- CUA Initiative on Technology and Teaching, 1998-2001

Dept. of Library and Information Science

- Admissions Committee, 2007-2009, Chair 2010-2012, Member 2013-2015, Member 2018-2022
- Appointments and Promotions Committee, 1991-2022
- Student advisement, 1990-2022
- 4+1 Bachelor to Master program, Program Advisor, 2014-2022
- LIS Minor, Advisor, 2017-2022
- Curriculum Committee, 2020-21 (Member), 2021-2022 (Chair)
- Scholarship & Awards Committee, 2016-2018, 2020-21
- Comprehensive examination editor, 2020-21
- Symposium, Colloquium, Lecture Series Committee, May 2018-May 2020 (Chair)
- Symposium and Colloquium Committee, fall 2016-May 2018
- Bridging the Spectrum Symposium session moderator, 2018, 2019, 2020, 2021

- Organization of Information Core Course Outcomes Assessment, 2019, 2020
- The Information Professions in Society Core Course Outcomes Assessment, 2019, 2020
- Community Services Librarianship, Course of Study Review and Revision, 2020
- Organization of Information, Course of Study Review and Revision, 2019
- Organization of Information, Competency and Course Offerings Review, 2018-2019
- Accreditation presentation, Chair, June 2015-August 2016
- Interim Co-Chair, June 2015-August 2016.
- Blended/OWL Learning Committee, spring 2016-2018
- Technology Committee, fall 2016-2017
- Comprehensive examination editor, 2016-2017, reader (every year since 1990)
- LIS Advisory Board, 2015-2016 (chair); fall 2016- May 2018 (member)
- Committee on Planning and Assessment, 2015-2016 (chair)
- Senior Faculty Committee, 2014-2016.
- Accreditation Steering Committee, 2014-2016 (Chair, 2015-2016)
- Accreditation Students Standard Committee, co-chair, 2014-2016
- Accreditation Mission, Goals, and Objectives Standard Committee, co-chair, 2014-2016
- Accreditation Curriculum Standard, member 2014-2-16
- Accreditation Administration and Finance Standard, member 2014-2016
- Cultural Heritage Information Management Project (IMLS-funded), Co-PI, 2012-2015
- Cultural Heritage Information Management Forum (scheduled for June 2015), Co-Organizer, 2013-2015
- Health Information Technology Interim Review Committee, 2015 (chair)
- Health Sciences Librarianship Advisory Group, 2015- (chair)
- Comprehensive examination editors, 2013-2014, 2016-2017
- National Digital Stewardship Alliance liaison, 2011-2014
- Advisory Board, Chair 2010-2012
- Academic Honesty Committee, Chair, 2008-2012
- Blended Learning Committee, 2010-2012
- Colloquium Committee, 2010-2012
- Comprehensive Examination Administration, 2010-2012
- Cultural Heritage Information Management Advisory Committee, 2010-2012 (chair), 2013-
- Curriculum Committee, 1991-2003, 2007-2009, Chair 2010-2012, member 2013-
- Curriculum Subcommittee on Comprehensive Examination, Chair 2009-2012
- Health Information Technology Advisory Board, Chair 2010-2012. Member 2013-
- Health Sciences Advisory Committee, 2009, Chair 2010-2012. Member 2013-
- HIT Expert Forum, Chair 2012. Member 2013-2015
- Health Information Technology Student Group Advisor, 2011-2012
- State Council for Higher Education of Virginia, SLIS Representative, 2010-2012
- Symposium Planning Committee, 2010-2012
- Website Management Team, Chair, 2010-2012
- Urban School Librarianship Project (IMLS-Funded), PI, 2007-2011 (chair, 2010-11)

- Failing Grades Committee, 1995-1997 (chair), 2000-2001 (chair), 2004-2005 (chair), 2007 (chair)-2011
- Faculty Search Committee, 1994-1998, 2002-2004, 2006 (chair), Fall 2007-2009, Chair fall 2009-2012
- Recruitment Committee, Chair 2010-2012
- Strategic Planning Committee, Chair 2010-2012
- Technology Committee, 2010-2012
- Accreditation Advisory Committee, 2007-2009
- Accreditation Coordinating Committee, 2007-2009
- Accreditation Steering Committee, 2007-2009
- SLIS Advisory Group, 2007-2009
- Accreditation Curriculum Standard Committee, Co-chair, 2007-2009
- Accreditation Faculty Standard Committee, Co-chair, 2007-2009
- LSC 551 Information Organization Review Team, Co-chair, 2008-2009, 2015-2016.
- Curriculum Subcommittee on Portfolios, 2009
- LSC 555 Information Systems in Libraries and Information Centers Review Team, contributor, 2008-2009
- Redesign of LSC 730 Use and Users of Libraries and Information. 2009-
- Development of a metadata institute that was taught as LSC 715 Organization of Internet Resources in 2008. The institute is being revised and will be offered in 2010 under a new course title.
- Development of lesson plans, assignments, and evaluation rubrics for LSC 606, Cataloging and Classification, for the School's NCATE accreditation. 2008
- Howard and Mathilde Rovelstad Scholarship Committee, Chair, 2004-2007
- Assistant Dean Search Committee, Chair, Fall 2007
- Liaison to the Association for Library Collections and Technical Services to bring its preconference program, Cataloging Education and Employer Expectations, to CUA during the 2007 American Library Association Annual Meeting in Washington, D.C.
- Organizer of the colloquium presentation and reception for Tamar Sadeh of Ex Libris on PRIMO June 2007
- Practicum review and design (work with potential supervisors, such as the American Indian Museum internship description revision) 2006-
- Comprehensive examinations (edits, proctoring, and grading), 1990-
- SLIS Web site redesign: Comments and suggestions. Fall 2007
- Conducted surveys of current students and alumni in preparation for the 2005 re-accreditation, 2004-2005
- Technology Committee, 1992-1999 (chair, 1996-1998), 2002-2003 (member)
- Colloquia Committee 1997-1999, 2002-2003.
- Advisor of the CUA Student Chapter of the American Society for Information Science and Technology, 2002-2003
- Visiting Professor Search Committee, 1999, 2000, 2001
- Leader, Participation in the CORC experiment, 1999-2000
- Advisor of the Special Libraries Association Student Chapter, 1993-1999; the group was recognized for outstanding leadership by SLA in 1999.

- COA planning Committee, Task Force on Electronic Presentation of SLIS Reports (team leader) 1997-1998
- COA Planning Committee, Subcommittee on Technology 1996-1998
- NLM practicum coordinator, 1997-1998
- Computer Literacy Workshops: Assisted with the development and evaluation of the workshops, 1996-1998
- Leader, Participation in the InterCat project, 1995-1997

APPENDIX B

[Library of Congress](#) >> [MARC](#) >> [Understanding MARC](#)

MARC 21 Reference Materials

[Part VII: A Summary of Commonly Used MARC 21 Fields](#)

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[Part IX: The Leader](#)

[Part X: Field 008 for Books](#)

Part VII:

A Summary of Commonly Used MARC 21 Fields

This is a summary of the MARC 21 tags used most frequently by libraries in entering their own bibliographic records. For full listings of all MARC 21 tags, indicators, and subfield codes, see *MARC 21 Format for Bibliographic Data*.

In the explanations on these pages:

Tags -- The tags (3-digit numbers) are followed by the names of the fields they represent. In this summary, and in the *MARC 21 Format for Bibliographic Data*, if a tag can appear more than once in one bibliographic record, it is labeled repeatable (R). If it can only be used once, it is labeled non-repeatable (NR). For example, a catalog record can have several subjects, so the tags for subject added entries (6XX) are labeled repeatable (R).

Indicators -- The use of indicators is explained in fields where they are used. Indicators are one-digit numbers. Beginning with the 010 field, in every field -- following the tag -- are two character positions, one for Indicator 1 and one for Indicator 2. The indicators are not actually defined in all fields, however. And it is possible that a 2nd indicator will be used, while the 1st indicator remains undefined (or vice versa). When an indicator is undefined, the character position will be represented by the character # (for blank space).

Subfield codes -- All the data in each field (beginning with the 010 field) is divided into subfields, each of which is preceded by a delimiter-subfield code combination. The most common subfield codes used with each tag are shown. Each subfield code is preceded by the character \$, signifying a delimiter. The name of the subfield follows the code.

In general, every field **MUST** have a subfield 'a' (**\$a**). One exception that is often seen is in Field 020 (ISBN), when the ISBN information (subfield **\$a**) is unavailable but the price (subfield **\$c**) is known. Some subfields are repeatable. In this summary, repeatability is noted for only the more common repeatable subfields.

Examples: Examples follow the explanation for each field. For clarity, one space has been placed between the tag and the first indicator, one space has been placed between the second indicator and the first delimiter- subfield code, and one space has been inserted between the delimiter-subfield code and the subfield data.

010 Library of Congress Control Number -- (LCCN)

(NR, or Not Repeatable)

*Indicators undefined.**Subfield used most often:***\$a** -- Library of Congress control number

Example: 010 ## \$a ###86000988#

020 International Standard Book Number -- (ISBN)

(R, or Repeatable)

*Indicators undefined.**Subfields used most often:***\$a** -- International Standard Book Number**\$c** -- Terms of availability (often a price)**\$z** -- Cancelled/invalid ISBN (R)

Example: 020 ## \$a 0877547637

040 Cataloging source -- (NR)*Indicators undefined.**Subfields used most often:***\$a** -- Original cataloging agency**\$c** -- Transcribing agency**\$d** -- Modifying agency (R)

Example: 040 ## \$a DLC
 \$c DLC
 \$d gwhs

100 Main entry -- Personal name -- (primary author)

(NR; there can be only one main entry)

Indicator 1: Type of personal name entry element

0 -- Forename

1 -- Surname (this is the most common form)

3 -- Family name

Indicator 2 undefined.

Indicator 2 became obsolete in 1990. Older records may display 0 or 1

*Subfields used most often:***\$a** -- Personal name**\$b** -- Numeration

- \$c** -- Titles and other words associated with a name (R)
- \$q** -- Fuller form of name
- \$d** -- Dates associated with a name (generally, year of birth)

Example: 100 1# \$a Gregory, Ruth W.
 \$q (Ruth Wilhelme),
 \$d 1910–

130 Main entry -- Uniform title -- (NR)

Indicator 1: Nonfiling characters

0-9 -- Number of nonfiling characters present (for initial articles, including spaces)

Indicator 2 undefined.

Indicator 2 became obsolete in 1990. (See 100 above.)

Subfields used most often:

- \$a** -- Uniform title
- \$p** -- Name of part/section of a work (R)
- \$l** -- Language of a work
- \$s** -- Version
- \$f** -- Date of a work

Example: 130 0# \$a Bible.
 \$p O.T.
 \$p Psalms.

240 Uniform title (NR)

Indicator 1: Uniform title printed or displayed

0 -- Not printed or displayed
 1 -- Printed or displayed (most common)

Indicator 2: Nonfiling characters

0-9 -- Number of nonfiling characters present (for initial articles, including spaces)

Subfields used most often:

- \$a** -- Uniform title
- \$l** -- Language of a work
- \$f** -- Date of a work

Example: 240 10 \$a Ile mystérieuse.
 \$l English.
 \$f 1978

245 Title Statement (NR)*Indicator 1:* Title added entry

(Should the title be indexed as a title added entry?)

0 -- No title added entry

(indicates a title main entry; i.e. no author is given)

1 -- Title added entry

(the proper indicator when an author given in 1XX; the most common situation)

Indicator 2: Nonfiling characters

0-9 -- Number of nonfiling characters present, including spaces; usually set at zero, except when the title begins with an article; e.g., for *The robe*, the second indicator would be set to 4. The letters *T*, *h*, *e*, and the space following them are then ignored in alphabetizing titles. The record will be automatically filed under "r" -- for *Robe*.

*Subfields used most often:***\$a** -- Title proper**\$h** -- Medium (often used for non-book media)**\$p** -- Name of part/section of a work (R)**\$b** -- Reminder of title (subtitles, etc.)**\$c** -- Remainder of title page transcription/Statement of responsibility

Example: 245 14 \$a The DNA story :
 \$b a documentary history of gene
 cloning /
 \$c James D. Watson, John Tooze.

246 Varying form of title (R)*Indicator 1:* Note/title added entry controller

1 -- Note, title added entry

3 -- No note, title added entry

Indicator 2: Type of title

-- No information provided

0 -- Portion of title

1 -- Parallel title

4 -- Cover title

8 -- Spine title

*Subfield used most often:***\$a** -- Title proper

Example: 246 3# \$a Four corners power review

250 Edition statement (NR)

Indicators undefined.

Subfield used most often:

\$a -- Edition statement

Example: 250 ## \$a 6th ed.

260 Publication, distribution, etc. (Imprint) (R)

Indicator 1: Sequence of publishing statements

-- No information provided

Indicator 2: Undefined

Subfields used most often:

\$a -- Place of publication, distribution, etc. (R)

\$b -- Name of publisher, distributor, etc. (R)

\$c -- Date of publication, distribution, etc. (R)

Example: 260 ## \$a New York :
 \$b Chelsea House,
 \$c 1986.

300 Physical description (R)

Indicators undefined.

Subfields used most often:

\$a -- Extent (number of pages) (R)

\$b -- Other physical details (usually illustration information)

\$c -- Dimensions (cm.) (R)

\$e -- Accompanying material (for example, "teacher's guide" or "manual")

Example: 300 ## \$a 139 p. :
 \$b ill. ;
 \$c 24 cm.

440 Series statement / Added entry--Title

This field was made obsolete in 2008 to simplify the series statement. See 490 and 830.

490 Series statement (No added entry is traced from field) (R)

Indicator 1: Specifies whether series is traced (whether an 8XX tag is also present)

0 -- Series not traced

1 -- Series traced (8XX is in record)

Indicator 2 undefined.

Subfield used most often:

\$v -- Volume number (R)

500 General note (R)

Subfield used most often:

\$a -- General note (Used when no specialized note field has been defined for the information. Examples: Notes regarding the index; the source of the title; variations in title; descriptions of the nature, form, or scope of the item.)

504 Bibliography, etc. note (R)

Subfield used most often:

\$a -- Bibliography, etc. note

505 Formatted contents note (R)

Indicator 1: Type of contents note

0 -- Complete contents

1 -- Incomplete contents (used with multivolume set when some volumes are not yet published)

2 -- Partial contents

Indicator 2: Level of content designation

-- Basic

Subfield used most often:

\$a -- Formatted contents note

520 Summary, etc. note (R)

Indicator 1: Display constant controller

-- Summary

- 1 -- Review
- 2 -- Scope and content
- 3 -- Abstract

Indicator 2 undefined

Subfields used most often

- \$a** -- Summary, abstract, or annotation
- \$b** -- Expansion of summary note

Example: 520 ## \$a This basic guide to parliamentary procedure tells how to conduct and participate in a meeting properly.

600 Subject added entry -- Personal name (R)

Indicator 1: Type of personal name entry element

- 0 -- Forename
- 1 -- Surname (this is the most common form)
- 3 -- Family name

Indicator 2: Subject heading system/thesaurus (identifies the specific list or file which was used)

- 0 -- Library of Congress Subject Headings
- 1 -- LC subject headings for children's literature
- 2 -- Medical Subject Headings
- 3 -- National Agricultural Library subject authority file
- 4 -- Source not specified
- 5 -- Canadian Subject Headings
- 6 -- Répertoire de vedettes-matière
- 7 -- Source specified in subfield \$2

(Note regarding Sears subject headings: The MARC 21 format does not provide an assigned indicator for Sears subject headings. Therefore, an indicator of 7 is used, and the MARC defined code "sears" is placed in subfield \$2.)

Subfields used most often:

- \$a** -- Personal name (surname and forename)
- \$b** -- Numeration
- \$c** -- Titles and other words associated with a name (R)
- \$q** -- Fuller form of name
- \$d** -- Dates associated with a name (generally, year of birth)
- \$t** -- Title of a work
- \$v** -- Form subdivision (R)
- \$x** -- General subdivision (R)
- \$y** -- Chronological subdivision (R)
- \$z** -- Geographic subdivision (R)
- \$2** -- Source of heading or term (used with 2nd indicator of 7)

Example: 600 10 \$a Shakespeare, William,
 \$d 1564–1616
 \$x Comedies
 \$x Stage history.

Example: 600 10 \$a Shakespeare, William,
 \$d 1564–1616
 \$x Knowledge
 \$z Rome
 \$v Congresses.

Notice that subfields \$v, \$x, and \$z in the 600 field are repeatable. Subfields \$v, \$x, \$y, and \$z do not have to be in alphabetical order. They will be in the order prescribed by the instructions given by the subject heading system.

610 Subject added entry -- Corporate name (R)

Indicator 1: Type of corporate name entry element

0 -- Inverted name (not used with AACR2)

1 -- Jurisdiction name

2 -- Name in direct order

Indicator 2: Subject heading system/thesaurus.

See indicator 2 under 600

Subfields used most often:

\$a -- Corporate name or jurisdiction name as entry element

\$b -- Subordinate unit (R)

\$v -- Form subdivision (R)

\$x -- General subdivision (R)

\$y -- Chronological subdivision (R)

\$z -- Geographic subdivision (R)

\$2 -- Source of heading or term (used with 2nd indicator of 7)

Example: 610 10 \$a United States.
 \$b Army Air Forces
 \$v Biography.

650 Subject added entry -- Topical term (Most subject headings fit here.) (R)

Indicator 1: Level of subject

-- No information provided

Indicator 2: Subject heading system/thesaurus

(identifies the specific list or file which was used)

0 -- Library of Congress Subject Headings

1 -- LC subject headings for children's literature

- 2 -- Medical Subject Headings
- 3 -- National Agricultural Library subject authority file
- 4 -- Source not specified
- 5 -- Canadian Subject Headings
- 6 -- Répertoire de vedettes-matière
- 7 -- Source specified in subfield \$2

Note regarding Sears subject headings: The MARC 21 format does not provide an assigned indicator for Sears subject headings. Therefore, an indicator of 7 is used, and the MARC defined code "sears" is placed in subfield \$2.)

Subfields used most often:

- \$a -- Topical term
- \$v -- Form subdivision (R)
- \$x -- General subdivision (R)
- \$y -- Chronological subdivision (R)
- \$z -- Geographic subdivision (R)
- \$2 -- Source of heading or term used with 2nd indicator of 7)

Example: 650 #0 \$a Theater
 \$z United States
 \$v Biography
 \$v Dictionaries.

Notice that subfields \$v, \$x, and \$z in the 650 field are repeatable. Subfields \$v, \$x, \$y, and \$z do not have to be in alphabetical order. They will be in the order prescribed by the instructions given by the subject heading system.

651 Subject added entry -- Geographic name (R)

Indicator 1: undefined.

Indicator 2: Subject heading system/thesaurus.

See indicator 2 under 600

Subfields used most often:

- \$a -- Geographic name
- \$v -- Form subdivision (R)
- \$x -- General subdivision (R)
- \$y -- Chronological subdivision (R)
- \$z -- Geographic subdivision (R)
- \$2 -- Source of heading or term (used with 2nd indicator of 7)

Example: 651 #0 \$a United States
 \$x History
 \$v Chronology.

Notice that subfields \$v, \$x, and \$z in the 651 field are repeatable. Subfields \$v, \$x, \$y, and \$z do not have to be in alphabetical order. They will be in the order prescribed by the instructions given by the subject heading system.

700 Added entry -- Personal name (R)

Indicator 1: Type of personal name entry element

- 0 -- Forename
- 1 -- Surname (this is the most common form)
- 3 -- Family name

Indicator 2: Type of added entry

- # -- No information provided (most common; co-authors, editors, etc.)
- 2 -- Analytical entry (The values for Indicator 2 changed in 1994 with Format Integration, and older records may display additional values. An analytical entry involves an author/title of an item contained in a work.)

Subfields used most often:

- \$a** -- Personal name
- \$b** -- Numeration
- \$c** -- Titles and other words associated with a name (R)
- \$q** -- Fuller form of name
- \$d** -- Dates associated with a name (generally, year of birth)
- \$e** -- Relator term (such as ill.) (R)
- \$4** -- Relator code (R)

Example: 700 1# \$a Baldrige, Letitia.

710 Added entry -- Corporate name (R)

Indicator 1: Type of corporate name entry element

- 0 -- Inverted name (not used with AACR2)
- 1 -- Jurisdiction name
- 2 -- Name in direct order

Indicator 2: Type of added entry.

See Indicator 2 under 700

- # -- No information provided
- 2 -- Analytical entry

Subfields used most often:

- \$a** -- Corporate name or jurisdiction name as entry element
- \$b** -- Subordinate unit (R)

Example: 710 2# \$a Sunburst Communications (Firm)

740 Added entry -- Uncontrolled related/analytical title (R)

Indicator 1: Nonfiling characters

- 0-9 -- Number of nonfiling characters present (for initial articles, including

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Part VIII:

A List of Other Fields Often Seen in MARC Records

001	Control number
003	Control number identifier
005	Date and time of latest transaction
006	Fixed-length data elements -- additional material characteristics
007	Physical description fixed field
008	Fixed length data elements (See Part X)
022	International Standard Serial Number (ISSN)
037	Source of acquisition
041	Language code
043	Geographic area code
050	Library of Congress call number
060	National Library of Medicine call number
082	Dewey Decimal classification number (the one recommended by the Library of Congress; locally-assigned call numbers may appear elsewhere)
110	Main entry -- Corporate name (less frequent under AACR2 rules)
256	Computer file characteristics
263	Projected publication date (indicates a CIP -- Cataloging in Publication -- record)
306	Playing time
508	Creation/production credits note
510	Citation/references note (review sources)
511	Participant or performer note
521	Target audience note (first indicator: 0 = reading grade level, 1 = interest age level, 2 = interest grade level, 3 = special audience characteristics, 4 = motivation interest level)
530	Additional physical form available note
538	System details note
586	Awards note
656	Index term -- Occupation
730	Added entry -- Uniform title
852	Location
856	Electronic location and access
9XX	Reserved for local use. (They are used by vendors, systems, or individual libraries to exchange additional data)

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Part IX:

The Leader

There are 24 positions in the Leader, numbered from 00 to 23. For fuller explanation, see the *MARC 21 Format for Bibliographic Data*.

- 00-04 Record length (calculated by the computer for each record)
- 05 Record status
 - a = increase in encoding level
 - c = corrected or revised
 - d = deleted
 - n = new
 - p = increase in encoding from prepublication (previous CIP)
- 06 Type of record
 - a = language material
 - c = printed music
 - d = manuscript music
 - e = cartographic material
 - f = manuscript cartographic material
 - g = projected medium
 - i = nonmusical sound recording
 - j = musical sound recording
 - k = 2-dimensional nonprojectable graphic
 - m = computer file
 - o = kit
 - p = mixed materials
 - r = 3-dimensional artifact or naturally occurring object
 - t = manuscript language material
- 07 Bibliographic level
 - a = monographic component part
 - b = serial component part
 - c = collection
 - d = subunit
 - i = integrating resource
 - m = monograph/item
 - s = serial
- 08 Type of control
 - # = no specified type
 - a = archival
- 09 Character coding scheme
 - # = MARC-8
 - a = UCS/Unicode
- 10 Indicator count (always "2")
- 11 Subfield code count (always "2")
- 12-16 Base address of data (calculated by the computer for each record)
- 17 Encoding level
 - # = full level

- 1 = full level, material not examined
- 2 = less-than-full level, material not examined
- 3 = abbreviated level
- 4 = core level
- 5 = partial (preliminary) level
- 7 = minimal level
- 8 = prepublication level (CIP)
- u = unknown
- z = not applicable
- 18 **Descriptive cataloging form**
 - # = non-ISBD
 - a = AACR2
 - i = ISBD
 - u = unknown
- 19 **Multipart resource record level**
 - # = Not specified or not applicable
 - a = Set
 - b = Part with independent title
 - c = Part with dependent title
- 20 **Length of the length-of-field portion** (always "4")
- 21 **Length of the starting-character-position portion** (always "5")
- 22 **Length of the implementation-defined portion** (always "0")
- 23 **Undefined** (always "0")

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Part X:

Field 008 for Books

Field 008 is used for Fixed Length Data Elements ("Fixed Field Codes"). There are 40 character positions in field 008, numbered from 00-39. Undefined positions must contain either a blank (#) or a fill character (|). Positions 00-17 and 35-39 are defined the same way for all media.

The information shown here for positions 18-34 applies only to books. For explanation of all the positions below and for positions 18-34 for other media, see the *MARC 21 Format for Bibliographic Data*.

Note that field 008 has no indicators or subfield codes.

- 00-05 **Date entered on file (YYMMDD)**,
where Y=year, M=month, and D=day
- 06 **Type of date/publication status:**
 - b = no dates given; B.C. date involved
 - e = detailed date
 - s = single known date/probable date
 - m = multiple dates
 - r = reprint/reissue date (Date 1) and original date (Date 2)

- n = dates unknown
- q = questionable date
- t = publication date and copyright date
- | = no attempt to code

07-10 Date 1/beginning date of publication

11-14 Date 2/ending date of publication

Date fields contain the year(s) of publication. The type of date(s) in these elements are specified in fixed field element 06: Type of date/publication status. (For further details, see the field 008 description in the *MARC 21 Format for Bibliographic Data*.)

15-17 Place of publication, production, or execution

For example:

pk# = Pakistan

cau = California (US)

(For a full list of codes used in these positions, see the *MARC Code List for Countries*.)

18-21 Illustrations (up to 4 codes):

- # = no illustrations
- a = illustrations
- b = maps
- c = portraits
- d = charts
- e = plans
- f = plates
- g = music
- h = facsimiles
- i = coats of arms
- j = genealogical tables
- k = forms
- l = samples
- m = phonodisc, phonowire, etc.
- o = photographs
- p = illuminations
- | = no attempt to code

22 Target audience:

- # = unknown or not specified
- a = preschool
- b = primary
- c = pre-adolescent
- d = adolescent
- e = adult
- f = specialized
- g = general
- j = juvenile
- | = no attempt to code

23 Form of item:

- # = none of the following
- a = microfilm

- b = microfiche
- c = microopaque
- d = large print
- f = braille
- r = regular print reproduction
- s = electronic
- | = no attempt to code

24-27 Nature of contents (up to 4):

- # = no specified nature of contents
- a = abstracts/summaries
- b = bibliographies (is one or contains one)
- c = catalogs
- d = dictionaries
- e = encyclopedias
- f = handbooks
- g = legal articles
- i = indexes
- j = patent document
- k = discographies
- l = legislation
- m = theses
- n = surveys of literature
- o = reviews
- p = programmed texts
- q = filmographies
- r = directories
- s = statistics
- t = technical reports
- u = standards/specifications
- v = legal cases and notes
- w = law reports and digests
- z = treaties
- | = no attempt to code

28 Government publication:

- # = not a government publication
- i = international intergovernmental
- f = federal/national
- a = autonomous or semi-autonomous component
- s = state, provincial, territorial, dependent, etc.
- m = multistate
- c = multilocal
- l = local
- z = other type of government publication
- o = government publication -- level undetermined
- u = unknown if item is government publication
- | = no attempt to code

29 Conference publication:

- 0 = not a conference publication
- 1 = conference publication

- | = no attempt to code
- 30 **Festschrift:**
 - 0 = not a festschrift
 - 1 = festschrift
 - | = no attempt to code
- 31 **Index:**
 - 0 = no index
 - 1 = index present
 - | = no attempt to code
- 32 **Undefined (since 1990)** (Earlier records may contain the values 0 or 1)
 - # = Undefined
 - | = no attempt to code
- 33 **Literary form:**
 - 0 = not fiction (not further specified)
 - 1 = fiction (not further specified)
 - c = comic strips
 - d = dramas
 - e = essays
 - f = novels
 - h = humor, satires, etc.
 - i = letters
 - j = short stories
 - m = mixed forms
 - p = poetry
 - s = speeches
 - u = unknown
 - | = no attempt to code
- 34 **Biography:**
 - # = no biographical material
 - a = autobiography
 - b = individual biography
 - c = collective biography
 - d = contains biographical information
 - | = no attempt to code
- 35-37 **Language:**
A three-letter code. For example: eng fre ger spa rus ita

(For a full list of codes used in these positions, see the [MARC Code List for Languages](#).)

- 38 **Modified record:**
 - # = not modified
 - x = missing characters (because of characters unavailable in MARC character set)
 - s = shortened
 - d = "dashed-on" information omitted
 - r = completely romanized/printed cards in script
 - o = completely romanized/printed cards romanized
 - | = no attempt to code
- 39 **Cataloging source:**

= national bibliographic agency
c = cooperative cataloging program
d = other sources
u = unknown
| = no attempt to code

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Library of Congress

[Library of Congress Help Desk](#) (10/27/2009)

APPENDIX C

Appendix C. Materials Considered

EX	Description
1061	Londergan, S., & Freeland, P. (1999). <i>Lotus Notes R5 For Dummies Quick Reference</i> . Foster City, CA: IDG Books (“Londergan”).
1061A	Front matter of <i>Londergan</i> obtained from the Library of Congress.
1061B	Excerpts of <i>Londergan</i> from a copy obtained from Amazon Marketplace.
1061C	Peter Lauria. (August 13, 2001 Monday). Debt relief For Dummies. <i>Daily Deal</i> (New York, NY), obtained from LexisNexis.
1061D	Bibliographic and MARC records for <i>Londergan</i> , available at https://lcn.loc.gov/99062475 from the online catalog of the Library of Congress.
1061E	Profile of Library of Congress available at https://librarytechnology.org/library/2263 from libraries.org.
1061F	Copyright registration record for <i>Londergan</i> , available at https://cocatalog.loc.gov/cgi-bin/Pwebrecon.cgi?Search_Arg=Lotus+Notes+R5+for+dummies+quick+reference&Search_Code=TALL&PID=lodrbiit81Cv2R9QEZgIkjoxLJ63&SEQ=20241203150726&CNT=25&HIST=1 from the public catalog of the US Copyright Office.
1061G	Bibliographic and MARC records for <i>Londergan</i> , available at https://fdhm.ent.sirsi.net/client/en_US/default/search/detailnonmodal/ent:\$002f\$002fSD_ILS\$002f0\$002fSD_ILS:642571/one from the online catalog of the Fordham University Libraries.
1061H	Profile of Fordham University Libraries, available at https://librarytechnology.org/library/6926 from libraries.org.
1061I	Amazon record and user reviews of <i>Londergan</i> , available at https://www.amazon.com/Lotus-Notes-Dummies-Quick-Reference/dp/0764503197 .
App A	Hsieh-Yee CV
App B	Parts VII to X of Understanding MARC Bibliographic, available at https://www.loc.gov/marc/umb/um07to10.html

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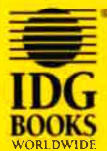


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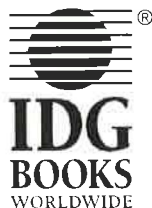
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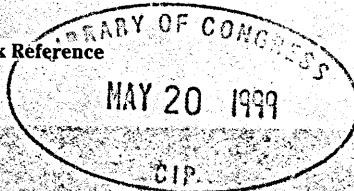
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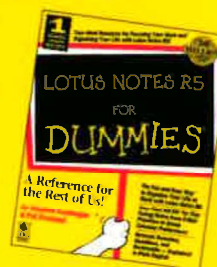
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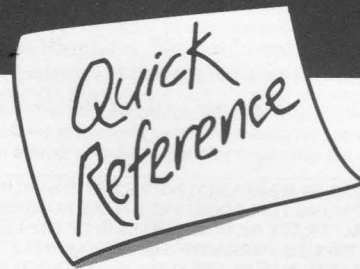


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and Pat Freeland**



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Dedication

For Engelbert Humperdinck.

— Stephen Londergan

Twice now, as I started to write a book, I lost a friend, both of them very special people. To Fred Doll and Sally Lenhardt.

— Pat Freeland

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How to Use This Book

You probably want to keep this little tome close at hand, ready to leap up and help you when you're trying to do something that you can't remember how to do or when you're trying to do something that you've never done before.

We try, in this book, to emphasize the *how* at the expense of the *why*, because we assume that you have better things to do than read computer books! Foolish assumption or not, we wrote the information in the following parts to get to the point as quickly and as accurately as possible. You probably don't plan to read the book from cover to cover, and that's okay with us. Just keep it handy so that you can quickly look up whatever you need to know.



How This Book Is Organized

To find out where to get information on how to do something, look in the Index or the Table of Contents. You can also figure out where to look by considering that we divide the book into eight parts, plus a glossary:

- ♦ **Part I** talks about some of the basic concepts that you need to master (or at least be familiar with) as you begin to use Lotus Notes.
- ♦ **Part II** is all about e-mail: how to send, read, and manage your electronic messages.
- ♦ **Part III** helps you figure out how to manage your schedule in Notes, creating appointments and events, checking others' availability, and managing resources like rooms and AV equipment.
- ♦ **Part IV** concerns using the other kinds of Notes databases that you may encounter.
- ♦ **Part V** explains everything you need to know to take Notes (and your laptop computer) on the road.
- ♦ **Part VI** shows you how to use Notes to search for text in anything from the contents of the screen to the contents of the World Wide Web.
- ♦ **Part VII** covers how Notes works with other programs and how you can incorporate the information that you have in other places in Notes documents.
- ♦ **Part VIII** explains how to change the way that Notes behaves to make it meet your needs and preferences.
- ♦ Last but not least, the **Glossary** at the end of the book can help you sort through some of the techno-jargon that's unavoidable, even in a book like this one.

Conventions Used in This Book

Here are a few other tips to help you get the most out of *Lotus Notes R5 For Dummies Quick Reference*.



When you need to click a SmartIcon, a picture of the icon appears immediately to the left of the related paragraph. For example, you may be reading about how to check the spelling in a document. When the instructions in the text say, "Click the Edit Check Spelling SmartIcon," the picture at the left of the paragraph shows which icon you use.

Managing Your Calendar

One of the coolest things about Notes is that your calendar is built right into your e-mail; you use your e-mail database to keep track of the meetings you need to attend, places you need to be, and even things you need to do. What's more, you can use the Notes-based calendar to schedule meetings with other people at your company or organization, and you can even check their availability before you propose a meeting time.

Opening your calendar

You have three ways to open your calendar:

- ◆ Click the Calendar bookmark, which is the second in the Bookmark bar.



- ◆ Click the second Open Calendar button on the Notes Welcome page.



Calendar

 New Entry

- ◆ If you already have your e-mail open, click the Calendar button at the very bottom of the Navigation page.



Opening somebody else's calendar

You can open and manage other people's calendars, too. For example, you may be responsible for tracking your boss's appointments, so you want to open his or her calendar, respond to meeting invitations on his or her behalf, and so on. Here's how:

1. Choose File⇨Database⇨Open or press Ctrl+O.
2. Select the name of the server with the person's calendar that you want to open in the Server field of the Open Database dialog box.
3. Select the person's e-mail file in the Database list. (You may have to open the Mail folder, first.)
4. Click the Open button.



If you need to open another person's calendar regularly, drag the Task button for the person's calendar into your Bookmark bar, so that you can easily find it in the future.

Viewing your calendar

Use the Calendar view in your e-mail database to see the appointments, meetings, and other events that you added (or someone else added) to your schedule. The calendar screen contains a lot of information, so we provide here a blow-by-blow description of each button and other parts of the screen:

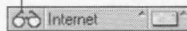
- 1 ♦ **One day:** This button shows you one day's calendar items.
- 2 ♦ **Two days:** This button shows you two days' calendar items.
- 7 ♦ **One week:** This button shows you seven days' worth of calendar items. The following figure shows a sample calendar, using the seven-day view.
- 14 ♦ **Two weeks:** This button shows you 14 days' calendar items.
- 31 ♦ **One month:** This button shows you a whole month's calendar items.
- ☑ ♦ **Clock:** This button shows or hides the free time. In other words, hiding the free time means that you see only the times when you have a meeting; showing the free time means that your calendar displays the hours when you are free, too.
- ♦ **Week-by-week calendar:** You can click any day in the calendar to go to that day. Use the little black arrows at the top of the calendar to quickly move through your calendar, one week at a time.

Access

Knowing what you *can* do in a database is important. A database has seven levels of access, which are listed in the access control list (ACL), and all users are given or denied privileges in the database based on the access level assigned to them.

You can determine your level of access to an open database by looking in the third section from the right in the status bar, where you see a symbol of your access level. If you click on the symbol, you see a message about what the symbol means.

Access-level symbol



If you find yourself barred from doing something, you may not have the right access level to do what you want to do. From the top, the levels are as follows:

- ◆ **Manager:** Can do anything, including changing the access control list.
- ◆ **Designer:** Can change the design elements, such as forms, views, and folders.
- ◆ **Editor:** Can make changes to all documents in the database.
- ◆ **Author:** Can create and read documents.
- ◆ **Reader:** Can read but not create documents.
- ◆ **Depositor:** Can create but not read documents.
- ◆ **No access:** Can't even open the database. If you don't have access to a database and you try to open it, you receive the curt message "You are not authorized to access that database."

Bulleted Lists

Bullets make paragraphs look like items in a list (as an example, check out the bulleted list in the previous section). To use bullets, follow these steps:

1. Highlight the existing paragraphs that you want to convert into bullets, or just start a new line.



2. Click the Text Bullets SmartIcon. The text you highlighted converts to bullets. Every time you press Enter, a new paragraph starts with a bullet.

3. When you're done using bullets, press Enter to start a new paragraph and then click the same SmartIcon to turn off the bullets.

Database Icons

You can't open a database until you add its icon to your desktop or a bookmark folder. One of the bookmarks in your bookmark folder is called Workspace. Clicking that bookmark opens the Notes workspace where you see icons representing the databases you have opened in the past. Each icon is a square with the following properties:

- ◆ The name of the database
- ◆ Possibly a picture (depending on how motivated the database designer was)
- ◆ Perhaps some other information, such as the server on which the database resides and how many unread documents in the database

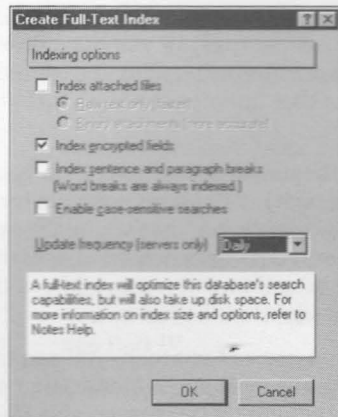
The last two bits of information, the server and the number of unread documents, don't display automatically. You have to choose to display them. Open your Notes workspace and choose View⇨Show Unread and View⇨Show Server Names.

Unfortunately, you have no automatic way to know about all the databases that are available to you. So how do you find out what databases are available?

- ◆ A fellow employee or your boss officially informs you about a database that you need to use.
- ◆ Your company may publish a list of important databases. Your company may even have a database that catalogs all the available databases.
- ◆ You accidentally overhear a conversation about a useful database.
- ◆ You may ask coworkers about places to find information that you need.
- ◆ You use the Notes menu to see what's available.

Using the menu may seem like the most sensible choice, because you can reasonably assume that all Notes databases appear when you use the menu. Unfortunately, Notes doesn't work that way. You must use the menu to open a database, but the menu isn't necessarily the way to see all the databases in your company.

138 Full-Text Index



- ◆ **Index attached files:** Notes actually reads all the files attached to each document and includes their contents in the full-text index. Wanna guess what happens to the size of the index?
- ◆ **Index encrypted fields:** Notes reads and includes the contents of encrypted fields in the index. If the search finds a document with the search text in an encrypted field, Notes includes that document in the results — even though you may not be able to read the document. See Part IV for information about encryption.
- ◆ **Index sentence and paragraph breaks:** This option makes it possible to find words in a document when they're in the same paragraph or sentence as other words in a search. If you search for "travel" near "policy," you find only documents in which the two words are close to one another, excluding documents that simply contain the two words scattered throughout. This feature tells Notes to remember not only the word, but also where it occurs. Space hog!
- ◆ **Make case sensitive:** This option really increases the size of the index on disk, but if distinguishing between *Sue*, *sue*, and *SUE* is really important, by all means check it.
- ◆ **Update index:** This option determines how often the index is updated. Because the indexing process does take valuable server resources — in other words, it slows the server down — you should choose to index as infrequently as possible.



Creating an index takes a while because Notes has to index every document in the database the first time. The good news is that updating the index after that doesn't take as long, because Notes only has to update the index to reflect users' changes (new,

deleted, and edited documents) since the index's last update. After you create the index, the Index tab of the Database Properties box changes to show the current status of the index.



You can get an idea of how long the indexing process will take, or at least how necessary it is, by clicking the Count Unindexed Documents button on the Full Text tab of the Database Properties box. You may decide not to bother updating the index if it's not too out-of-date. On the other hand, you may decide to go ahead with the update because it won't take very long for just one document. It's your call.

When you're ready to update the index, just click the Update Index button on the Full Text page of the Database dialog box. If you decide that you don't need a database index after all, click the Delete Index button. Why would you want to do that? Perhaps because you're running out of disk space or you simply never do a search for text and therefore don't need the index. These reasons aside, an index is a handy thing to have around.

Full-Text Search



When you use the Search icon in the Navigation bar, you can search anything from a Notes document to the world. Where you look, what you look for, how you want the search results displayed, and what specific search conditions you want to use are all contained somewhere in that Search icon. The choices you can make are determined by where you plan to look and whether the database you're searching has a full-text index.



We didn't get into word and paragraph breaks when talking about setting search criteria because that gets a bit complicated. A search formula to take advantage of sentence and paragraph breaks looks like this:

("gold" sentence "silver") paragraph "diamonds"

Here, you look for the words *gold* and *silver* in the same sentence and in the same paragraph as the word *diamonds*. In this formula, the words *sentence* and *paragraph* aren't text that the search looks for; they're actually part of a search formula.

Searching through all the documents in the view

In this section, we talk about the whole document, not just the text displayed in a view containing the documents you want to rifle through. In a view, you may see just the documents' title and author's name, but of course there is much more information in the document you may need to search.

146 Home Page Search Buttons

your criteria to those with the fewest occurrences. The vertical bar, called the *marker bar*, at the left-hand side of the view represents the relative frequency of your criteria in each document. The darker the bar, the more occurrences in that particular document.

Remember: You can choose to sort documents in other ways than by relevance. Just be sure you make the decision before the search.

You open a document uncovered by a search the same way that you open any other document: Double-click it or select it with your mouse and press Enter. Notes then shows you the document and highlights the text that you wanted to find. As you read a document retrieved by a full-text search, you can jump quickly to the next occurrence of the search text by pressing Ctrl++ (that's the Control key and the plus sign). You use Ctrl+- (Control and the minus sign) to jump quickly to the preceding occurrence of the word.

Resetting the stage

After you read the documents that interest you, click the Reset button to clear the search and return all documents to the view.



If you want to conduct another search, you don't need to click Reset first; instead, just type in a new bunch of text, set your conditions, and then click Search. Typing a new search word makes Notes forget all about the old search and returns only documents that satisfy the new set of criteria. You really only need to use the Reset button when you're completely done searching.

Home Page Search Buttons

Below the task center is yet another way to search. Click the down arrow in the text box next to Search, and then select Notes Database Catalog or an Internet search option. Enter some search text in the text box to the right and then click the Search button.

Keyword Fields

Some fields in your documents enable you to do a kind of search. The fields contain lists from which you may choose one or more items, rather than typing them in. You can find just what you're looking for in a keyword field without having to scroll up and down in a long list. Just zero in on an item by typing its first letter.

For example, in the name, To, cc, and bcc fields in the memos in your e-mail database, you can start to type the name of the person you want to find, and Notes anticipates what you're typing and finishes the name for you. If Notes gets it wrong, just keep typing the name, and after you type enough of the name to distinguish your choice from similar names, Notes finishes the name for you.

People Searches

Notes can even find a person for you, without making you open a bunch of databases such as the registry. To find someone, follow these steps:

1. Click the down arrow next to the Search icon in the Universal Navigator.
2. From the drop-down list, choose Find People.
3. In the Directories dialog box that appears, choose where to Look in.
4. Enter some helpful text in the Starts With box (a few distinguishing characters will do), and click Search. The results of your search appear in the Search dialog box.

Highlight a line in the results if you want to see Details and click the Details button. The page in the appropriate registry opens so that you can see more about the person. Click Add to Personal Name & Address Book if you want to use the name to address memos in the future.

Directories

Look in: Local Address Books

For: Search

Enter name of addresses you would like to find into the text box above, then press 'Search.'

Results will be displayed here.

Details Add to Personal Name & Address Book

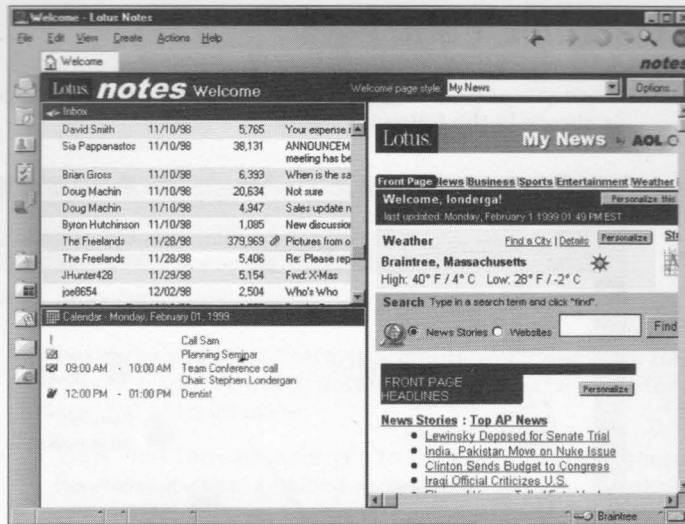
Detailed Search...

For	Operator	Value	
Last Name	Contains	Kemp	Add Condition
And First Name	Doesn't Contain	Kathryn	Remove Condition

Refine your search by adding query conditions here, then press Search. Search

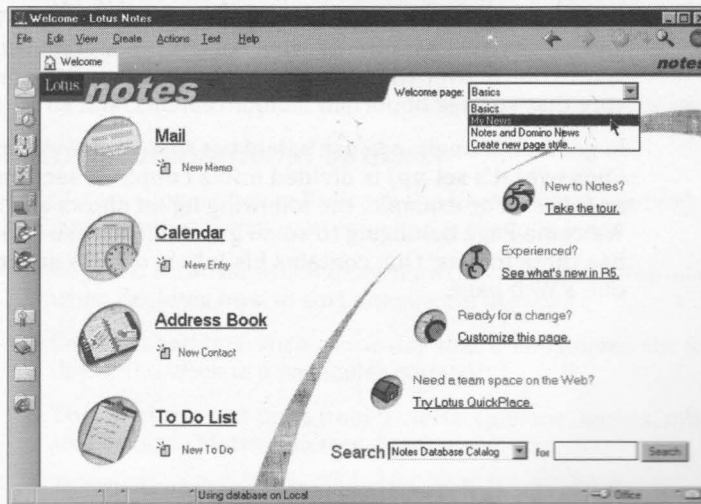
OK Cancel Help

180 The Welcome Page



Changing the Welcome Page

You can easily change the layout of your Welcome Page: Simply choose the layout you want from the Welcome page style drop-down list, as shown in the following figure.



Notes comes with these three Welcome Page styles:

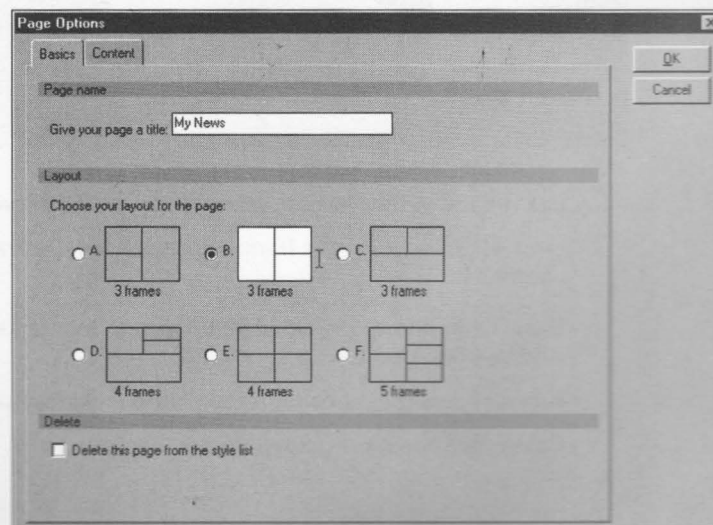
- ◆ **Basics** is the simplest. It's the default style and displays the Welcome Page with all those pictures of kids.
- ◆ **My News** is a little more informative. It contains three pages: one for your Inbox, one for your calendar, and one for a special news page from America Online.
- ◆ **Notes and Domino News** is similar to My News but has a Web page from the Lotus Web site instead of America Online.

Remember: If you're happy with the layout and content of one of these Welcome page styles, just pick the one you like, and you're in business. If, on the other hand, you want to customize the Welcome Page — perhaps add another frame or change what's in one of the frames — select the style you want and then click the Options button.

Customizing the page

As we mention previously, you can customize the Welcome Page in a couple of different ways. You can choose exactly how many frames of information the page contains, and you can change each frame's content.

To modify the layout or content of a Welcome Page, first select the Welcome Page you want to change from the Welcome page style drop-down list and then click the Options button. The Page Options dialog box appears.



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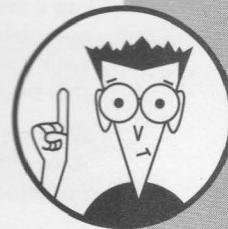
Techie Talk

@Function: A formula element containing preprogrammed calculations that make writing a formula much easier. Examples are @Sum, @UserName, @Now.

Accelerator key: A keystroke combination used to accomplish the same thing as choosing a menu item. Ctrl+Z is the accelerator key for Edit→Undo.

Access Control List (ACL): The part of every Notes database that determines who can do what in that database. See also *Author, Depositor, Designer, Editor, Manager, No Access, and Reader*.

Actions: Tasks that normally involve several keystrokes and that are assigned to buttons and/or a special menu and then associated with views, forms, and folders so that you can easily perform them. Actions are what happen when you click buttons in the Action bar.



Administrator: The person who is in charge of running the Domino servers at your company and to whom you should turn if you have questions or problems.

Agent: A miniprogram or set of instructions that automates tasks in Notes. (Formerly called *macros*.)

Alarm: A visual or audible reminder of a scheduled event in your calendar.

Application designer: The person at your company who created the database(s) you use. Also known as *Database manager* and *Application manager*.

Application server: (†) A Domino server that is only used for application databases — in other words, it does not have anybody's e-mail database on it. (2) A computer application used to create data linked to or embedded in Notes documents.

Archive: A special copy of an e-mail or another database containing documents selected for storage away from current active documents.

Archive log: A summary of the documents that have been put in an archive database.

Archive profile: A special form used to set the criteria for determining which documents should be put in an archive.

Attachment: A file (Lotus 1-2-3 worksheet, Microsoft Word document, and so on) that has been included in a Notes document. You can only put attachments in a rich-text field.

Author: (1) The person who composes a document and (usually) the only person who can edit or delete it. (2) A level of access you can have to a database. As an author, you can read documents, compose new documents, edit your own documents, and delete your own documents. (3) Someone like the fine people who wrote this book.

Balloon help: The things that show you what each SmartIcon does. Normally a Macintosh term, balloon help is becoming more common in Windows programs.

Bookmark: A pointer to a Notes item (a search or database, for example) or an item on the World Wide Web.

Browse: The official, more dignified term for surfing or cruising the Internet. Call it what you want; it means you look for information or just wander around (electronically, of course) to see what there is to see.

Workstation: The computer at your desk or (if you have a laptop) the computer in your briefcase. A workstation is the computer that each person uses to work with Notes.

Workstation-based e-mail: A setting that you use when your computer is not connected to a LAN, which causes Notes to queue up your outgoing e-mail until you place a phone call to a Domino server.

World Wide Web (WWW): A collection of computers on the Internet that have special pages you can view. See *Web page*.

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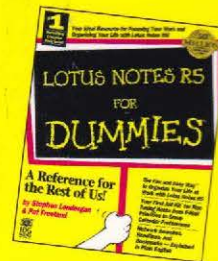
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