NEH-USAIN

PRESERVATION OF THE AGRICULTURAL, FORESTRY, AND FISHERIES LITERATURE OF WASHINGTON STATE

PROJECT MANUAL

ESSENTIAL BACKGROUND MATERIAL

The grant website is http://neh-usain.mannlib.cornell.edu/frames.html
Read the entire grant – see Grant Proposal IV (or V if now available online). The current grant cycle is Grant Proposal V. Bibliographic identification is the focus of this phase of the grant. Microfilming will occur after we reapply for funding.

Pay particular attention to **Section 4. Plan of Work and Project Goals.**

Read the UW piece of the grant proposal and see the UW timeline for the project.

Read the section on Bibliographic Identification on the grant website. There will be some differences in the approach we take but this will provide some further context.
Read Michigan State University and University of Wisconsin final reports, especially those parts pertaining to the bibliography. They discuss several problems they encountered working on the bibliography – it is good to learn from them!

Documents and databases referred to in this manual are in the \\tahoma\shareddocs\TechServices\Preservation\neh_grant folder on the server. Please always work with files here and keep the latest version of them in this folder. Always back up your files on your C:\\ drive too.

OCLC WORLDCAT & ENDNOTE 7

OCLC WorldCat is a cooperative catalog containing catalog records from libraries throughout the U.S. and Europe. Records downloaded from OCLC WorldCat will form the basis of the bibliography. After we complete OCLC WorldCat searching, we will supplement the bibliography using other reference sources and catalogs as needed.

EndNote 7 is the bibliographic citation management software that we will use to manage the downloaded OCLC records and to print our lists for ranking by scholars at the end of the project. The information entered here will also serve as the basis for another database when we begin the microfilming phase of the project.

References in the EndNote database are tagged. The layout used for each reference for this project is the "generic" reference type (see pg. 366 of EndNote manual). Fields from OCLC WorldCat have been imported into specific fields in the "generic" reference type using the WorldCat (OCLC) for NEH filter. The NEH-USAIN EndNote Database Data Dictionary (ENDNOTEdb_dictionary.doc) shows how OCLC records are mapped to the EndNote database "generic" reference fields. *Do not alter the import filters, reference type, or move information from one field to another without consulting me. Data consistency and appropriate coding is absolutely essential to the functionality of the databases individually and as a group.*

SCOPE OR WHAT MATERIALS TO INCLUDE AND EXCLUDE

For consistency among the many states participating in this grant, the proposal specifies what materials to include/exclude in the bibliography. We have some discretion over what to include/exclude for our own state bibliography so we may make the case for including/excluding something from the grant proposal's defined subject scope.

One difference for the Washington State bibliography will be that we will also include fisheries. We might also put more emphasis on forestry than some others since this has long been a major agricultural economy in the state. Forestry is included in the grant subject scope under "Technical Agriculture." We will also include materials that address the Pacific Northwest as a region since no other libraries in the region have yet participated in this grant to systematically preserve their agricultural and forestry literature.

If you are not sure whether or not a topic or heading falls within the scope, please bring it to our attention. If in doubt, it is better to include everything at this point and we can weed titles/topics out later. The records of your searches on the "Searches Imported" Form (searches_imported.xls) will help us to create scope documents for the scholarly reviewers when they rank titles for preservation along with your experiences and any notes/questions you compile related to scope while you work. I strongly encourage you to keep notes relating to the scope while you work in the "Scope Questions" document since it is very easy to forget these details over time (I speak from experience!).

The biggest category of exclusions and inclusions involve format and date of publication. Below are the format and time coverage parameters as defined by the grant proposal (see http://neh-usain.mannlib.cornell.edu/frames.html). ***Please include monographs and pamphlets less than 24 pages in the bibliography. We may include these in the ranked lists or, at minimum, we will create a separate list of pamphlets so reviewers are aware of why these shorter titles aren't on the larger list.***

Format and Time Coverage

1. **Inclusions**
   Publications issued between 1820 and 1945
   Monographs and pamphlets of more than 24 pages published before 1946
   (*please ignore page limit and include all above regardless of page length*)
   Land-Grant publications
   State government documents, particularly of major departments
   Trade, popular, and scientific journals published in or about the state
   Dissertations

2. **Exclusions**
   Colonial tracts, charters or other pre-1820 publications
   Manuscripts and archival materials
   Almanacs
   Reprints or individual numbers of serials
   (*you will either list the serial instead of the reprint or if serial is out of scope as a whole, you will exclude both the serial and the reprint*)
   Publications below the county level
   Maps and gazetteers
   Newspapers (except agricultural only)
   State legislative and census documents, compilations of laws, court cases and judicial hearings
   County histories

The following is the subject scope as defined by the grant proposal. This information has been taken directly from the project website, http://neh-usain.mannlib.cornell.edu/frames.html:

SUBJECT SCOPE OF THE HISTORICAL BIBLIOGRAPHY

Preserving the Published Heritage of a State's Agriculture, Rural Economy and Society; 1850-1945

This phase of the project aims to list the universe of publications which make up the historical record of a State's agriculture, rural economy and societal activities. Materials earlier than 1850 may be considered for inclusion although in all states they would be considered rare and probably already preserved. The general categories outlined here provide a wide range of literature which overlap disciplines. The subject parameters are meant to be very inclusive to help determine the size of the pertinent literature and the preservation problem. The scope will probably be adjusted by each state during the course of the compilation and evaluation which should be considered a useful and desirable action. As well as the time limitation, some format exclusions will also be implemented.

The rural and agricultural world should be viewed as group activities of people who live in the country and the effect of these activities on the farm people themselves. This should include outside influences (e.g. advertising, war) as well as those within a state which affected the activities and character of rural people.

SPECIFIC SUBJECT AREAS: Agricultural, Rural Economy, and Society

1. Rural Economy: Agricultural economics; farm organization and management; production economics; food distribution; state food supply; statistical data; agricultural prices; marketing of agricultural products; small scale, home production and marketing of agricultural products (e.g., garden produce, orchards, poultry and eggs); agricultural and food policies (state level only); cooperatives; agricultural finance; land economics and land use; land tenure; rural industry and business connected with the processing and marketing of agricultural products; rural economy other than farm economy; food imports.

Exclusions: Econometric methods; international trade in agricultural products; accounting and business management; agricultural and business law; taxation and public finance; farm labor and its organizations; commercial commodity exchanges; land transfer and registration records.

2. Technical Agriculture: Farming, food and nonfood agricultural products; major, minor, and experimental crops; agronomic techniques, including plant breeding; animal science; forestry; crop insects and diseases and their control; food science; home gardens and home food processing; agricultural engineering (farm equipment, farm structures, agricultural technology); irrigation; rural transportation; natural resources pertaining to agriculture (soils, water, meteorology); conservation of natural resources pertaining to agriculture; beekeeping.

Exclusions: Paper industry; plant biology; botany; natural history; entomology; ecology; geology; veterinary practice and research; energy resources; water power; limnology; livestock show and breeding records; water power development; canals and railroads, except where specifically treating relationship to agriculture.

3. Rural Society: Family farming; the farm home and family; rural communities and their standards of living; rural organizations (e.g. agricultural societies, Grange, Farm and Home bureau, 4-H, church, improvement societies); rural political organizations and farmers' movements; farm demographics; child care and nutrition, particularly for farm families; rural communications including the press; rural libraries and schools; home economics as a high school or college discipline (and by extension or other state services); rural urban migration; nature study movement; country life movement; rural play and recreation activities; county and local fairs; home economics as an academic discipline; cooperative extension service; farm people's attitudes and opinions; development of rural leadership; selected mail order catalogs of interest to farm families; role of women in farm life and rural communities; RFD; REA; automobiles and rural life; rural architecture; rural health and medical care; rural social services, welfare, and social security; rural art; rural water supply and waste water treatment; engineering and efficiency aspects of a farm house (sanitation, water supply, safety, home design, equipment, and refrigeration); management of farm workers, domestic employees, and farm home.

Exclusions: Television; rural poverty; industrialization; local government; taxation (except as it relates specifically to farm land and products); county history; state associations of towns and school boards; suffrage.

Mann Library
June 2000

Below are my first attempts at subject scopes for the Forestry and Fisheries lists. Please use these scope notes as a guide but you will certainly uncover other topics as you compile records and we'll add other subject themes as the bibliography is completed.

SPECIFIC SUBJECT AREAS: Forestry

Forest management; afforestation and reforestation; forest soils; tree farms and woodlots; harvesting trees or logging; forest insects, diseases and their control; forest fires and their control; forestry engineering (forest machinery and technology); log transportation (including forest roads and logging railroads); the manufacture of logs into lumber or lumbering; the lumber trade; forestry statistics; sawmills; timber; trees (e.g. cedar, Douglas fir, Western hemlock, Western red cedar) and woods (e.g. pulpwood) for forest products; and the forest products industry, including the marketing of forest products. Also, forest ecology; natural resources pertaining to forestry; and conservation of natural resources pertaining to forestry. Forestry schools and education, including University of Washington School of Forestry and University of Washington. Foresters' Alumni Association. Demonstration and Experimental Forests (e.g. Charles Lathrop Pack Experimental and Demonstration Forest). National forests and forest reserves (e.g. Gifford Pinchot National Forest and Olympic National Forest). Lumber companies (e.g. Weyerhaeuser Timber Company and Pope & Talbot, Inc.). Loggers, lumbermen, and lumber camps. Organizations including the Loyal Legion of Loggers and Lumbermen, West Coast Lumbermen's Association, and Keep Washington Green.

SPECIFIC SUBJECT AREAS: Fisheries

Fishes and fisheries management including fish-culture, fish hatcheries, fishes migration, fish populations, fish stocking, fish tagging and fish kills. Fish as food and the fish trade; fishery processing and products including canned fish, canneries, cannery workers, the salmon canning industry and individual canning companies like Carlisle Packing Company; fisheries including specific species (e.g. salmon, oysters) and specific locations (e.g. Columbia River, Washington State). Dams as they relate to fisheries including the effect of dams on fish and fishways. Fishing including equipment (boats, nets, trawls and trawling). Fishers, hunting and fishing clubs,

and game and wildlife conservation. Natural resources pertaining to fisheries and conservation of natural resources pertaining to fisheries. Marine pollution and resources; also water pollution and water quality as it relates to fisheries. Fisheries schools and education, including University of Washington College of Fisheries. Organizations including Fisheries Educational Association and International Pacific Salmon Fisheries Commission.

WHAT NEEDS TO BE DONE NEXT: SEARCHING OCLC WORLDCAT

When searching WorldCat use the Advanced Search screen and use a combination of keyword and LC subject heading searches. Do not *only* use LCSH or *only* keyword or some relevant titles will be missed. Please note that Michigan State University found searching by LCSH with a geographical subdivision (e.g. agricultural machinery – Michigan) too restrictive in most instances since documents frequently did not have a geographic subheading. They eventually adopted a practice of searching a topic (e.g. agricultural machinery) along with "Michigan" or "Mich." as a place of publication. Please adopt this practice in order to discover the "universe" of materials.

Searching by geographic region will be more complicated for us since "Washington" will also show up in all Washington, D.C. and federal documents. For that reason, start with "Wash." and "Washington State" as geographic search terms. Also, search "Northwest*" or "Northwest, Pacific" since Washington State material will be included and no one else in the region has participated in this project. (Be aware that the Northwest sometimes refers to the Midwest as well.) On some occasions you may also want to search "Pacific," particularly when collecting fisheries materials since some relevant records pertaining to Washington State will be entered under Pacific Coast.

A list of sample subject headings for agriculture (including forestry) and home economics are listed at the project website. The subject headings from the old fisheries and forest bibliographies may also be somewhat helpful. These headings are listed in OLDforestrydb_subject.rtf and OLDfishdb_subject.rtf in:
\\tahoma\shareddocs\TechServices\Preservation\neh_grant\OLDEndNote_dbs Please note that not all of the old database subject headings will be useful since the scope of the earlier project was somewhat different.

Retrieving serial titles can be especially challenging since they often have few and very broad subject headings. For example, a subject search alone would probably not retrieve the Washington State Forestry Association *Annual meeting* (1897?-) since the subject heading is the rather general Forests and forestry – Congresses and there is no geographic subdivision. However, a keyword search on Washington State and forestry will retrieve the record. Subject headings that are subdivided geographically are excellent at making sure you haven't overlooked anything and for limiting your results since keyword searches will often inevitably retrieve many records that are out of scope. See the red LCSH books in Ready Reference or use the Library of Congress Authorities at http://authorities.loc.gov/cgi-bin/Pwebrecon.cgi?PAGE=sbSearch&SEQ=20040526194805&PID=23419 for the heading scope notes and to help recognize the relationships between LCSH search terms (including see alsos, narrower terms, etc.). See the example authority heading for Farm Life as an example.

When searching WorldCat, limit your search to year: 1820-1945 and to type: Books and Serials since only these materials will be included on the list. Any microfilm records will be included within the Books and Serials.

See the section on "Cleaning Up and Coding References" below for more information about downloading and combining information in one record, especially for microfilm, serial reprints,

multiple editions, and serial runs with title changes. Also for information on coding Pacific Northwest titles.

RECORDING YOUR SEARCH, MARKING AND DOWNLOADING RECORDS FROM OCLC WORLDCAT

After you submit your search, review your search results and select the relevant records by marking them. On the Searches Imported Form, record your search, the total number of search results, and the number of results you selected for importing. For example, keywords=canner* and wash.; years=1820-1945; type=serials and books. 10 total results, 6 selected for import. Someone else should be able to reproduce your search exactly with these notes and this will establish a record of all your searches and approximately how many searches were downloaded. If you are routinely limiting to years=1820-1945 and type=books and serials, you don't need to note this every time. Just make it clear that this limit applies to all your searches. As mentioned above this information will help us further define the scope of the bibliography. More importantly, it will also help you keep track of the searches you've done so you don't duplicate your own work.

Once you have marked all the records you want to download from your search, select the EXPORT button.

On the Direct Export Screen, choose EXPORT MARKED RECORDS FROM THIS SEARCH. The default often seems to be all records so you will have to change this when you download records. Also choose EXPORT TO TEXT FILE. Then select the EXPORT button.

Save your text document in the NEH grant folder. Give it a name that gives you an idea of the search terms (e.g. canwash.txt) in case you download several files at once or need to re-import data. You may also want to record the file names on your Searches Imported Form but it isn't necessary.

Open up your EndNote database. Under FILE>IMPORT, choose your text file for import into EndNote. The other options should read Import Option: WorldCat (OCLC) for NEH; Duplicates: Import All; Text Translation: No Translation

Your newly imported references will appear in a new window in EndNote. Verify that you've imported the same number that you selected for import in OCLC on the Searches Imported form. You do not need to keep the .txt files once you've imported the records into EndNote successfully.

CLEANING UP AND CODING REFERENCES IN ENDNOTE

Select an individual record by highlighting it and double-clicking or pressing return.
Records should automatically display in the "generic" reference type as specified in the WorldCat (OCLC) for NEH filter. See the NEH-USAIN EndNote Database Data Dictionary (ENDNOTEdb_dictionary.doc) to see how the OCLC fields are mapped to this generic reference type and how some of the headings have been used for other purposes or are not used at all.

You may use REFERENCES>FIND DUPLICATES to locate similar titles. However, do NOT use this to simply delete one of the titles. EndNote compares author and title so references may be from different dates or slightly different in other ways. Verify that the two titles are EXACTLY the same. If in doubt, leave both references in. We can follow-up on duplicates at the end of the project.

If you have more than one record for a title and one is microfilm, it maybe easiest to only download the microfilm record. If there are several microfilm records for one title, download them all and combine all the microfilm info into one record at a later point. It is important that we know all the microfilm sources for a particular edition since quality and costs vary quite a bit. All the microfilm records will be listed separately for reviewers since these titles have already been preserved and therefore, won't need to be ranked for preservation.

If a title is a reprint from a serial (e.g. Forest fire prevention handbook for the schools of Washington from the series: Miscellaneous publication (United States. Dept. of Agriculture) ;; no. 40), remember that reprints are excluded from the scope. The reason for this is that microfilming should include the complete run of the title or the complete serial. If there is a reprint relevant to the bibliography, decide if the serial is within scope or not. In the above example, the serial is out of scope since it is a federal publication with a subject breadth much greater than Washington State. This will often be the case. In these instances, do not download the reprint. Sometimes the serial that the reprint is from will be in scope (e.g. Rural social organization in Whitman County from the series Bulletin (State College of Washington. Agricultural Experiment Station) ;; no. 203). In this case, you may want to download the reprint as a reminder to search and include the serial title in the bibliography and then later delete the reprint. It is important to note relevant serial titles from the reprints since this is one of the ways to gather serial titles without relevant subject headings or keywords.

If you have more than one edition for a title (e.g. The Egg and I, 1940 & 1945), download all editions and later combine them into the record for the first edition. In the above example, include the 1940 edition on the list but also include a note about the 1945 edition in the notes field so that reviewers are aware of all editions.

For serials that have changed their names several times, please combine the entire serial run into one record. Use the beginning title as the record or title and use the EndNote Alternate Title field to record the serial history. Preceding and succeeding titles should automatically download into this field although sometimes the title history information may have to be moved from the EndNote Notes field. Combine serial titles with long complicated histories into one record as much as possible and include volume/date information for each title in the Alternate title field. See the example of *The Columbia River and Oregon timberman* in the NEH_FOR.enl EndNote database.

For corporate authors, put a comma after the name. Be sure there are no commas within the corporate author name because all the text before the comma is interpreted by EndNote as a last name when formatting citations for printing. This can be cleaned up later so it isn't necessary to do this right away but it might be easier for complex corporate authors where it's not as clear how to format them later. Be aware that WorldCat sometimes doesn't download the "and" in corporate author names (e.g. it leaves out the "and" in Western Forestry and Conservation Association (U.S.)) and replaces it with a comma. Anyway, it will only be important to have corporate authors properly formatted when printing bibliographies for the reviewers.

In order to separate Washington State titles from Pacific Northwest titles for the reviewers, it will probably be easiest to code Pacific Northwest titles as you import them into EndNote. Enter "PNW" into the Short Title field in EndNote. As long as the PNW titles are coded we can search on that field to separate them out. Also, if we want to enter WA for all the non-PNW titles at a later time, we should be able to easily do this with a global change. So don't waste your time entering WA into the Short Title field.

BACKUP PROCEDURES

At the end of each day or after adding a lot of information, backup up the EndNote database. Use the FILE>SAVE A COPY to save a copy in the BACKUPEndNote_dbs folder. Always keep the last 2-3 backups just in case you don't discover a database problem until a little later and one of your backups is also corrupted. Note the number of records in the database before backing up so that you'll recognize if records are missing should something go wrong, especially when the databases get larger. Also save a copy on the C:\\ drive of your computer just in case something happens to the version on the server. Once you drag a file or folder from the server to the trash it will be erased immediately and your only way to recover it will be from backup tapes.

PRINTING THE BIBLIOGRAPHY

I have set up a preliminary bibliography citation style for the databases called "NEH citation." This style can be found in EndNote under EDIT>OUTPUT STYLES. This should be the default output style but if not, select the style by going to EDIT>OUTPUT STYLES>OPEN STYLE MANAGER. With the exception of editing corporate author fields, you should not need to edit the records for punctuation since this can be accomplished more efficiently using the citation style.

To view a record in the preliminary "NEH citation" style, highlight the record. Select TOOLS>SHOW PREVIEW to view. The record will display in the selected citation in a window at the bottom of the screen. Choose TOOLS>HIDE PREVIEW to stop viewing the citation format.

It is not necessary to clean up records while you work on them. It is most important to first create the bibliography and remove duplicates. At this point it appears that most of the clean up will probably involve deleting repetitive information in the NOTES field of the record since the import filter often puts extraneous author and description information in that field that isn't always needed. We can alter the records and the citation style later but if you want to print the bibliography, make sure the "NEH citation" style is selected and then choose FILE>EXPORT. Save the file in .rtf format and then open/print using Word.