

Questions, answers, remaining issues with the CONSER standard record updated June 15, 2007

Agreement: CONSER members agreed to implement the CONSER standard record and monitor how it goes, suggest any changes needed in practices over the coming year. Ideas for improving user displays that can be achieved through MARC format improvements, suggestions to vendors for making better use of existing data, development of repeatable 260 fields will be pursued.

Action: Tina Schrader (NAL) has agreed to lead a MARBI proposal group to make recommendations related to the CONSER standard record. We will aim to get these proposals ready for ALA midwinter.

Action: CONSER as group will monitor the implementation of the standard throughout the coming year.

Implementation date: June 1, 2007 Its understood that many libraries will need to do some communication/logistical work locally before implementation and so there will be libraries that implement after this date. Other libraries will be more prepared to implement by June 1.

Questions about the CONSER standard record: CONSER Operations Meeting May 2-4, 2007 and additional questions since then

Record Modification: What can we fix/change in existing records?

1) Modifying an OCLC unauthenticated record with 7XX fields, can't establish without pieces in hand, what to do?

Possibilities: make use of 042= msc or cite the bib record as the source when creating a name authority record

2) Cloning from the print record, should we change to align with the CONSER standard record?

Consensus: no need to change cloned records to fit the standard.

3) What's the impact on not recording fixed fields for frequency/regularity on the Publication patterns macro?

Answer: For the most part the macro relies the 310 field for coding, the fixed fields as a last resort. Since the standard record requires updating the 310, the impact may be minimal.

4) What is the impact of not recording freq/reg fixed fields on other members of CONSER and OCLC that use it to establish check-in pattern from this?

Result of discussion: Not a clear way to mitigate this, coding these fixed fields are optional under CONSER standard. Lets implement and monitor the impact of this. Reach out to those who've suggested this is a problem and gather impact.

5) 321: now that there are no field limits, why not keep more than three 321 fields?

Agreed: we will change our CEG recommendations on this to not collapse these. Will there be an impact on record usability?

Action: The CEG instructions will be updated to reflect the decision not to collapse multiple 321 fields. We will monitor the impact of this decision on record usability.

6) Coding in NLM and NAL records "pre-implementation" coding how will these be handled?

Answer: the intent is to authenticate these later by adding 042 and an LCCN. If we come up with different coding for the record in the 246 fields and it is predictable, OCLC may be able to help us do this quickly.

7) Updating imprint changes. What is the status of the repeatable 260?.

Reply from Les: PCC can begin to pursue again. The utilities asked us to develop guidelines for use and there was disagreement on this when the group discussed it in the past. Perhaps now is a good time to re-start this effort to develop use of the repeatable 260 for serials and integrating resources. Comment: Will the fact that the publication date is no longer required be helpful in coming up with guidelines for implementing multiple 260s?

Action: Les will work with Carolyn Sturtevant to revive the PCC 260 group.

8) 246 coding: Do we need to rethink? Is it necessary to use coding that indicates that the information was part of the title proper?

Action: See decision in MAP.

Uniform titles

9) No longer use uniform titles for online versions where there is a title conflict?

Agreed: the intent of the CSR guidelines is not to qualify these.

Agreed: institutions may provide uniform titles as an option, but prefer to do so locally.
Comment: Locally, the qualifier “online” is often heavily relied on as a way to pull print /online records together for users, though not all print/electronic titles are identical. Use of other fields in the record, GMD, linking fields to pull versions together is not yet well developed in many systems or implementations.

Recommendation: We ought to monitor how this [not providing “online” as a qualifier] works in the coming months and look for new ideas and topics to raise with our system vendors.

10) Do we use a 240 uniform title when the main entry body and a generic title proper are identical to another serial, e.g. annual report entered under body?

Decision: Yes consider that the principle is the same as with title entry generic title and need for a uniform title: a 240 is needed.

Parallel titles

11) How many subsequent parallel titles not on the issue upon which the description is based should we provide?

Answer: Probably need to leave to cataloger judgment, what provides the best access to the resource.

Description based on note (DBO)

12) Suggestion: “Description based on first and only issue.” for a one issue only serial.

Many agreed: Good idea!

13) Combine DBO and LIC?

Answer: No, prefer to keep references to different issues separate, especially because “title from” will be part of DBO.

Source of title

14) Source of title required, even if it is title page?

Answer: Yes. The guidelines point to providing source of title in all cases.

15) Abbreviate t.p. or use title page?

Answer: This data is primarily for librarians or bibliographers, either is ok.

Numbering/Designation, use of unformatted notes, transcription

16) Form/language of dates: The question was, should we use form in the language found on the piece or substitute English? Impact on publication patterns, check-in other processing.

Answer: Probably best to stay with current practices for recording language found on the piece (AACR2 12.3B).

17) 515, can we clarify when to use? Essentially can't we use 515 as we have in the past, when we need it to explain complex numbering?

Action: examples in CONSER documentation need to be adjusted.

18) Repeating 362 1s? currently we only repeat if one is a 362 0 and one is a 362 1. Might be desirable to be able to repeat 362 1, for complex numbering transactions (e.g. Italian publications with lots of new series through the years) or to split up "Began with" and "Ceased with" information.

Action: implement as is, but pursue MARBI proposal that might help us express this information more clearly.

19) 362 0 die or live? 362 0 will need to be used for adding non-roman script numbering to records. Some institutions may be continuing to provide this formatted data, as we implement lets try to work with the unformatted 362, we may need to experiment and see how it works out. There are quite a few 362 0s (many more than not) in the CONSER database so this information is still going to be in the records. Lets reevaluate throughout the year.

Action: Set up CONSER group to monitor implementation of the standard, identify trends, suggest solutions.

Practices for special materials

20) It is recognized that newspapers, legal material, rare serials, area studies serials like Africana, some special formats like microforms and perhaps other specialized resources may have special requirements that go beyond what is "not required" in the CONSER standard record. Optional elements may need to be applied. Practices associated with these resources should be documented or updated in terms of the CONSER standard record, but not in the CONSER standard guidelines. There are guidelines for speicila format cataloging in the CONSER cataloging manual, at least for newspapers, microforms, law serials, and rare serials that can be updated. Additionally CONSER should pursue directly contacting specific communities, e.g. area studies groups, the law cataloging communities.

Possible actions: Explore out reach and impact of CONSER standard record with the legal cataloging community at cataloging interest group during AALL meeting this summer.

Recommendations for language editions/translations

21) Decision: Members agreed to adopt the language edition/translation recommendation of the CONSER standard record: Don't create a uniform title, use 730 and 775 link to provide collocation.

Problem identified with including 740 here. What does it mean? We may know about the original language ed from a database like ISSN Portal, want to provide the access, but no other bib record or authority exists. The group discussed ways around using 740, preferring to use a 730 instead seemed to be a consensus. Create NAR in these cases? (when no bib record exists) then provide as 730. This needs more consideration, but overall group agreed we are ok with implementing this with the CSR, probably should remove "740" from this part of the instructions. Will need to explore further as we implement and run into the situation.

22) A question was asked about collapsing existing [multiple records that wouldn't be needed now since entry would be different?] records for Language editions/Translations.

Consensus: Probably ok if collapsing really needed, but as with other new practices, prefer to leave existing records created under different guidelines.

23) Dealing with shelf listing issues that might arise because we are following the CSR language edition/translation recommendation.

Agreed: local adjustments, solutions need to be pursued.

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24) Reminder: additional subfields fields may be required for preservation microform.

\$e validation changes needed? Currently OCLC won't validate coding for microforms unless \$e, until the validation is changed, \$e will be need to be coded for microforms

Suggestion for coding from Stephen Early:

\$a (category of material) example: h -- Microform

\$b (specific material designation) example: d -- Microfilm reel

\$d (positive/negative aspect) example: a -- positive

\$e (dimensions) example: f -- 35 mm.

\$i (Generation) example: c -- service copy

Action: OCLC will need to pursue the validation problem.

550 statement of responsibility non-CONSER libraries

25) Full level cataloging on OCLC, level "I" doesn't require authorized heading, though libraries might do an authority record locally. What is the impact on non-CONSER libraries that want to use CONSER standard record? Suggest the approach of providing the statement of responsibility, justification in notes, when there is not an authority record available.

The group suggested taking opportunities for outreach to non-CONSER members.

26) What to do with a title that is used by different languages e.g. France bulletin, published in New York and is all in French, should it use 546 In French? Need for additional notes if unclear?

State simply the guideline: If not clear from 245 what the languages are in the resource, provide appropriate note.

Code "Orig" (008/22) required only for originally published microforms

Question for e-resources, does a fill character need to be valid in OCLC? Leaving the default code [blank] has a particular meaning was that meaning intended or was no attempt to code intended?

27) The question about using this fixed field for born digitals was raised. Not required but libraries can supply. Perhaps there will be local need for this and can be coded locally.

Series proposal

28) The group agreed to implement the recommendation on series coding made by the CONSER standard working group [see updated MAP]. Also the proposal will be sent formally to JSC through the PCC CC:DA representative.

Suppressing linking entries:

Agreed to update CEG to incorporate the recommendations from the PCC linking entry task group

776 \$c practice for microforms: Agreed: Change this practice in the CEG since linking fields are more important for access under the CONSER standard record.