

**Joint BIBCO CONSER Operations Meeting April 30, 2009** [Revised May 29, 2009]

**1) Next year's meeting: May 6-7, 2010.**

**2) Make 008/39 Obsolete?**

**Decision:** There was support for asking MARBI to make 008/39 obsolete. Before approaching MARBI, PCC will ask CDS CONSER file (MDS Serials) subscribers about the impact of making the field obsolete and will float the idea on the MARC email list.

**Action:** Les will coordinate the survey of CDS subscribers and MARC email list.

**Action:** If the outcome of the survey warrants, Les will coordinate writing of the MARBI proposal with the LC Network Development office and the Standing Committee on Standards.

**3) Discussion of the paper: *Use of the Term “(Online)” as a Series Qualifier for e-Resources and Other Series Related Issues (Rev. 4/13/09)*** <http://www.loc.gov/acq/conser/serqual.pdf>

**Decision:** CONSER and BIBCO operations representatives supported pursuing a PCC practice for online series qualifiers and creation of authority records for online series. The following reflects a revision of the proposal presented in the paper based on OpCo discussion and subsequent consultations with LC's Policy and Standards Division:

PCC practice decisions for provider neutral records (all three modes of issuance: serials, monographs, and integrating resources) for online series analytics:

- Give the controlled access point of the print series, if providing a controlled series access point for a series in a bibliographic record
- Do not create a separate series authority record for the online series and do not add information to the series authority record for the print series
- Do not delete an existing series authority record for the online series (the possible deletion of these authority records as recommended in the report must be discussed with the NACO participants, Policy & Standards Division, etc.; such a discussion won't occur until after the new provider neutral practice has been vetted for a period of time)

Example 1:

Print series:	130	Title XYZ
Provider-neutral online analytic:	830	Title XYZ*

CONSER standard record practice for collected set records describing online versions, whether the title is analyzable or not:

- Catalogers are not required to provide a uniform title to distinguish online from print formats
- If a print version record exists and contains a uniform title, add the uniform title of the print version to the record for the online version. Do not further qualify the uniform title by “(Online)”

- Do not delete an existing series authority record for the series

Example 2:

Print without uniform title:

Print: 245 Title ABC  
 Online: 245 Title ABC\*

Example 3:

Print with uniform title:

Print: 130 Generic title (Qualifier)  
 245 Generic title  
 Online: 130 Generic title (Qualifier)\*  
 245 Generic title

\*not further qualified by "(Online)"

Note: The discussion paper made recommendations about use of ISSN-L. Those recommendations were not accepted and are not part of this proposal. Instructions for the 490 in the MAP provide instructions for transcribing the ISSN of the print series if applicable.

Next steps:

- LC's Policy and Standards Division confirmed that changes needed to LCRI 25.5B will be made available on the web in early June and in the next update to Catalogers Desktop in August.
- Final comments from the Standing Committee on Standards, PCC members and cataloging email lists and other interested parties are due by: June 17, 2009. Comments may be sent to the Provider Neutral Record Task Group chairs Becky Culbertson (rculbertson@ucsd.edu) or George Prager (PragerG@exchange.law.nyu.edu)
- Final approval of PCC practices for online series by the PCC Policy Committee: June 26<sup>th</sup> 2009
- Implementation of the new PCC practices for online series and the guidelines for the Provider Neutral Record for E-monographs: July 17, 2009.

**4) Repeatable 260 guidelines:** <http://www.loc.gov/acq/conser/Guidelines-2009-260.pdf>

**Decision 1:** confirm an implementation date with OCLC. Any related LCRI work if needed can be coordinated with OCLC's timeline for implementation.

**Action:** Les will confirm implementation timeline with Glenn Patton (OCLC)

**Decision 2:** Revise the draft guidelines based on the OpCo discussion. Provide additional examples, including examples of \$c. Specify the order of 260s (indicators ## is always first, 3# is always last, 2# are between the first and last in chronological order earliest to latest). Clarify the wording referring to retaining intervening publication information to something like: retain or not according to the rules for noting changes in publication information. State policy on existing

records, catalogers are not encouraged to move publication information from 500 fields to repeatable 260 fields on existing records.

**Action:** Les is working with Policy and Standards Division staff on the guidelines and will post the revised version.

### **Outcomes of the CONSER Operations Meeting April 30- May 1, 2009:**

#### **5) Possible PCC uses of online conferencing**

**Outcome:** Many ideas were collected one of immediate interest was to hold a follow-up session after the operations meeting to go over decisions and outcomes of the Operations Meeting.

#### **6) MARC 583 for print archiving White paper:**

<http://www.loc.gov/acq/conser/PreservationActions.pdf>

**Decision:** The group agreed there was a good case for pursuing development of "communal" Local Holdings Records (LHR) to contain preservation action data in the 583 field.

**Action:** Constance Malpas (OCLC) will coordinate further discussions with John Riemer (UCLA) and Jake Nadal (UCLA) on the proposal set out in the white paper and put the topic on the agenda of the next RLG Preservation Actions Committee conference call.

#### **7) "Individual" CONSER membership application form <http://www.loc.gov/acq/conser/fast-track-form.pdf>**

**Discussion:** The requirement for institutional NACO membership was seen as a possible obstacle in fast tracking a new institution into CONSER membership when a cataloger moves from a CONSER institution to a non-CONSER institution. CONSER related NACO training could be simplified to focus on corporate name and series rather than personal names which are rare for serials. Perhaps a funnel approach should be set up to provide NACO work. Consideration needs to be given to longer term membership commitments of fast tracked institutions when staff changes.

#### **8) Discussion on filling gaps in Serials Solutions and other provider title lists**

**Decision:** CONSER will pursue coordinating listings of Serials Solutions and other provider titles that do not yet have a CONSER record associated. We can post the lists and CONSER members can focus on record creation for these titles.

#### **9) NISO best practices for title changes. A NISO working group will be formed later this year to work on the best practices.**

**Decision:** Publishers of non-latin script serials should also be identified and involved in the NISO working group.

## **10) Change of time for CONSER at-large meeting at ALA**

The 8:00 starting time for CONSER at-large will not change for ALA annual 2009. For future meetings, COIN staff will query others who attend (e.g. subscribers of CONSRLST, PCC list, SERIALST, CONSER operations representatives who didn't attend the OpCo meeting but do attend ALA) to determine if a later starting time, 8:30 or 9:00 would work for them.

## **11) CONSER members adding ISSN data from the ISSN Portal**

**Decision:** For non-US publications, CONSER catalogers with access to the ISSN Portal are asked to add the ISSN center code the \$2 when adding the 022 field. The code will be an indication that the ISSN has been confirmed by a CONSER institution. Additional ISSN information, 210 and 222 if institutional policy allows.

**Reminder:** CONSER catalogers are reminded not to remove the 263 with the coded expected date of publication when updating ISSN prepublication records.

## **12) Discussion of LC's continued use of the "NSD" OCLC authorization (records with code 040 = NSD; is the code needed to identify U.S. ISSN records?)**

**Outcome:** There was not a long discussion of this topic, most seemed to feel that "NSD" would not be needed to identify US ISSN records as long as 042 =nsdp is still used. LC is still considering this.

## **13) Joint LC/PCC LCRI/RDA Task Group recommendations on LCRIs that need to be retained as we approach RDA implementation**

**Decision:** CONSER agreed to retain LCRI 12.1F stating the CONSER standard record (CSR) practice that it is not required to record a statement of responsibility appearing on the serial issue used as the basis of the description.

**Rationale:** RDA core elements were derived from analysis of FRBR user tasks and ISBD national level data elements (as were the elements of the CSR application profile). The core elements are intended to define attributes that are appropriate to most resources. RDA does not require all core elements to be present in order for a record to be coded RDA. The CSR represents an application profile of a specific user community. The ability to define user community application profiles is still an expectation of RDA developers though it is uncertain how or if the final RDA product will make application profiles available.

## **14) Google Books Library Project Records, records generated by OCLC E-content Synchronization Program staff for electronic versions (referred to below as OCLCE records). These records are identified by the coding 040 #a OCLCE #b eng #c OCLCE.**

**The following practices for an FAQ were confirmed:**

**Questions:** Can CONSER members edit OCLCE records to reflect aggregator neutral practices? Can we authenticate them or merge them and report them as duplicates?

**Answer:** Yes. OCLCE records are intended to be aggregator-neutral serial records like any other e-serial records and are not a category of "allowed" duplicates. CONSER libraries can edit and authenticate them or report them as duplicates of other e-serial records.

**Questions:** It's possible that OCLCE records for online versions might be generated from a print latest entry record. What should be done with these records? Are these records considered "allowable" duplicates like other latest entry records found on OCLC?

**Answer:** If separate successive records already existed, report the latest entry OCLCE record for deletion. If no other records exist separate successive entry records can be created.

**Question:** Can CONSER members delete the multiple 856s that correspond to the print volumes of the participating library?

**Answer:** No. For the short term CONSER catalogers should not delete 856 fields on the national level record. If reporting a OCLCE record for deletion, the cataloger can move 856 fields or leave them on the record for OCLC to move them when they process the delete request.

**Question:** Are there any alternatives for handling the OCLCE record URLs?

**Answer:** Yes. There are ideas for longer term solutions

**Action:** Robert Bremer will ask OCLC colleagues about the idea of having E-content Synchronization Program generate a web page to contain 856 fields for a particular title.

**Action:** CONSER will pursue with OCLC the idea of maintaining 856 field information in a sharable Local Holdings Record (LHR).

**Who:** Naomi Young is compiling a list of possible functions for a shared LHR that have been raised by CONSER over the years including universal holdings record, the preservation action statement, Registry of Digital Masters, etc. Les will use this as a basis for approaching OCLC about widening functionality of the LHR.

**15) Discussion: Should CONSER make 776 and 856 optional on the print record when creating a record for the online version?**

**Decision 1:** CONSER will continue to supply reciprocal 776 fields in both the print and online records.

**Decision 2:** providing the 856 field on the record for the print version is now optional.

**Action 1:** CONSER documentation (CCM Module 31, CEG, and CONSER standard record) will be updated to reflect this decision.

**Who:** Les and Hien

**Action 2:** CONSER will ask OCLC to please investigate a way to generate reciprocal links when OCLCE records are being created.

**Who:** Les will pursue with Robert Bremer