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# Basic Cataloging Decisions

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## Overview

This instruction sheet will cover preliminary decisions about how to catalog a resource. These pre-cataloging decisions are the foundation for later cataloging processes, therefore, the examination and decision must be made first.

The preliminary decisions include: defining the resource type, and the appropriate number of records for that type of resource, and at what level to catalog a resource, whether at the comprehensive level or the level of the individual part. These decisions entail considerations of the mode of issuance of the manifestation and the extension plan of the work.

Some of the decisions will refer to related documentation, particularly [MG: Serial Work and Integrating Work Decisions](#). Another document that may address preliminary decisions for how to catalog a resource is the [MG: Aggregates](#); however, it will not generally address mode of issuance or how many records are required.

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## Changes from Original RDA

Original RDA	Official RDA
Comprehensive description	These three terms no longer exist in RDA. Instead, there is a decision about the level at which a cataloger can describe a work. Are you describing the complete work? Are you describing a part of work? Are you describing the work at different levels of detail? How many records does that require? What relationships exist between those works and how should you express them?
Hierarchical description	
Analytical description	

Mode of issuance includes: single unit, multipart monograph, serials, integrating resource	Mode of issuance includes: multiple unit, single unit
	Extension plan: static plan, successive indeterminate, successive determinate, integrating indeterminate, integrating determinate

### Mode of issuance and Extension plan

- RDA Toolkit categorizes mode of issuance as single unit or multiple units. This is a change from Original RDA, which allowed for four types: single unit, multipart monograph, serial, and integrating resource. **Mode of issuance** has been simplified to only address the number of units in a resource.
- A result of the change to **mode of issuance** is the creation of the element of **extension plan**. Extension plan describes whether or not a resource intends to continue or not, the method by which it intends to do so, and the planned termination point. This captures information that was previously in mode of issuance before it was simplified.
- Table 1 below describes examples of various types of works to which the combinations of **mode of issuance** and **extension plan** apply. This is not a complete listing of all types of works, but it does address all types of **extension plans**.

<b>Table 1. Type of work by mode of issuance and extension plan</b>			
<b>Type of work</b>	<b>Mode of issuance</b>	<b>Extension plan</b>	<b>Example</b>
Monograph	Single unit	Static plan	Novel
Multipart monograph	Multiple units	Successive <sup>1</sup> determinate	Encyclopedia with multiple volumes
Serial work	Multiple units	Successive indeterminate	Magazine
Integrating work	Multiple units or single unit	Integrating determinate	Project wiki(s)

<sup>1</sup> LC-PCC Policy dictates that multipart monographs will be treated as a static plan rather than as successive determinate.

Integrating work	Multiple units or single unit	Integrating indeterminate	Newspaper website, loose-leaf publication
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- Understanding the mode of issuance and extension plan helps the cataloger to decide the type of work(s) in hand and the consequent number of records that are necessary. A related decision is the recording method that will be used.
  - For example, if the work in hand is a serial with a consistently titled supplement, does the cataloger treat them as two related works? This would require two bibliographic records with a related work of work relationship to link the two together. The work relationship could be expressed via a structured description (authorized access point) or an unstructured description (a note).
  - Is the resource a serial with an occasional supplement with no differentiated title? This would require a single bibliographic record with the relationship to the supplement recorded via an unstructured description in a note.
- The sections below address such situations and the criteria that the cataloger should use to decide what type of work and relationships need to be expressed.
  - Questions related to whether or not a work is an aggregate and how that impacts cataloging is in the [MG: Aggregates](#) document.

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## Implementation with Metadata Examples

### Resource type and how many records

#### Monograph considerations

- When a book is received, the question can arise as to whether it is a copy of an earlier edition (new item of the same manifestation) or it is a separate edition needing its own bibliographic record (new manifestation). Since the entity boundaries of Manifestations are [extremely general](#), consider the following criteria in order to decide if it is a new item or a new manifestation:
  - New manifestation:
    - Does the edition explicitly indicate that there is a change (including corrections) to the original content?
    - Has anything from the original book's bibliographic record changed in the title and statement of responsibility, extent of manifestation, or the series

- statement? (For an exception relating to CIP items, read under “New item”.)
- New item: Are the book’s difference(s) from the older copy related to publication, distribution, etc., statement or to the ISBN? The book will be considered a copy of the original if the variation is one or more of the following:
    - A different printing or copyright date when there is also a publication date
    - A minor variation in an entity’s name when the publisher is using multiple forms (e.g., “Duckworth” and “G. Duckworth” and “St. Martin’s” and “St. Martin’s Press” have been used at the same time by these publishers). A genuine name change, even if minor, should not be considered a variation
    - The addition, deletion, or change of an ISBN
    - A different binding
    - A different edition statement or the series statement when the item is a CIP book

Examples	
MARC	<p>Example 1</p> <p>Situation: The two editions of the same work, published in the same year and by the same publisher, had significant differences in the edition statement and the extent of manifestation information.</p> <pre>250 ## \$a Family edition. 300 ## \$a xxii, 352 pages : \$b illustrations ; \$c 23       cm</pre> <p>Example 2</p> <pre>250 ## Second edition. 300 ## 2 volumes (various pagings) : #b       illustrations, portraits</pre>
BIBFRAME	<p>Example 1</p> <p>Situation: The two editions of the same work, published in the same year and by the same publisher, had significant differences in the edition statement and the extent of manifestation information.</p> <p>BIBFRAME Entity: Instance</p>

	<pre> &lt;bf:editionStatement&gt;<b>Family edition</b>&lt;/bf:editionStatement&gt; &lt;bf:extent&gt;   &lt;bf:Extent&gt;     &lt;rdfs:label&gt;<b>xxii, 352 pages</b>&lt;/rdfs:label&gt;   &lt;/bf:Extent&gt; &lt;/bf:extent&gt; &lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdf:type rdfs:resource="http://id.loc.gov/vocabular y/mnotetype/physical"/&gt;     &lt;rdfs:label&gt;<b>illustrations</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt; &lt;bf:dimensions&gt;<b>23 cm</b>&lt;/bf:dimensions&gt; </pre>
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### Multipart monograph?

- If the resource has multiple units, as indicated by the item in hand or by bibliographic records in the database, consider the factors listed below in order to decide to catalog the resource as a multipart monograph.
- Consider the [extension plan](#). If the resource indicates that it has a successive determinate extension plan (i.e., a predetermined conclusion of ongoing parts), catalog as a monograph.
- Consider the existence of a common title and a part title.
  - If the part titles have meaning, regardless of the context of the common title, create a record for each individual volume and treat the common title as a part work.
  - If the part titles only have meaning within the context of the common title, create a record for the complete work and record the individual part titles as an unstructured description or structured description of a part work.
    - See the instructions for related works for LC and PCC requirements vs. cataloger's judgment.

Examples	
MARC	Example 1

	<p>Situation: Individual volume title has meaning, regardless of common title</p> <p>245 13 \$a <b>La monarquía isabelina</b> / \$c <b>Juan José Abad, Lorenzo Trigo.</b></p> <p>490 1# \$a <b>Historia de España</b> ; \$v t. 15</p> <p>830 #0 \$a <b>Historia de España (Círculo de Amigos de la Historia)</b> ; \$v t. 15.</p> <p>NOTE: LC would not analyze the monographic series.</p> <p>Example 2</p> <p>Situation: Individual volume titles have meaning only within the context of the common title</p> <p>245 00 \$a <b>Agriculture in history</b> / \$c <b>R. Kent Rasmussen, project editor.</b></p> <p>505 0# \$a <b>Vol. 1. Prehistory-1747 -- v. 2. 1753-1958 -- v. 3. 1959-2002.</b></p>
BIBFRAME	<p>Example 1</p> <p>Situation: Individual volume title has meaning, regardless of common title</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;La monarquía isabelina&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>La monarquía isabelina</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:responsibilityStatement&gt;<b>Juan José Abad, Lorenzo Trigo</b>&lt;/bf:responsibilityStatement&gt; &lt;bf:seriesStatement&gt;<b>Historia de España ; t. 15</b>&lt;/bf:seriesStatement </pre> <p>AND,</p>

	<p>BIBFRAME Entity: Work</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;bf:mainTitle&gt;       <b>Historia de España (Círculo de Amigos de la         Historia)</b>     &lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; </pre> <p>NOTE: LC would not analyze the monographic series.</p>
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### Serial work?

- If the resource has multiple units, as indicated by the item in hand or by bibliographic records in the database, consider the factors listed below in order to decide to catalog the resource as a monograph or as a serial.
- Apply the instructions for publications of limited-duration activities as defined in [LC-PCC PS on successive determinate serials](#).
- Consider the frequency of publication.
  - If the resource has a stated frequency of publication (in the title proper, in the preface, etc.), catalog as a serial.
  - If the resource is published in new editions, catalog as a serial if the frequency of the editions is one to two years; give greater consideration to continuing to catalog as monographs if the editions are published three or more years apart.

Examples	
MARC	<p>Example 1</p> <p>Source information: Guidebook published every two to three years</p> <p>245 00 \$a Moon Charleston : \$b including Hilton Head &amp; the Low country.</p> <p>310 ## \$a Every 2 to 3 years</p>
BIBFRAME	<p>Example 1</p>



	<p>Source information: Guidebook published every two to three years</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Moon Charleston : including     Hilton Head &amp; the Low     country.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Moon     Charleston</b>&lt;/bf:mainTitle&gt;     &lt;bf:subtitle&gt;<b>including Hilton Head &amp;     the Low country</b>&lt;/bf:subtitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;<b>Every 2 to 3     years</b>&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; &lt;/bf:frequency&gt;           </pre>
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- Consider the presence and type of numbering. Although the presence of numbering is no longer part of the definition of a serial, most serials except for unnumbered monographic series will have numeric, alphabetic, and/or chronological designations.
  - If the resource has a numeric/alphabetic (e.g., volume 1; tome 3; Heft A) or chronological designation (e.g., 2001; June 2002; 2002-1) in the title proper or elsewhere in the resource **and** it is likely that the resource doesn't have a predetermined conclusion, catalog as a serial.
  - If the resource has acquired a numeric, alphabetic, or chronological designation after the first issue, recatalog as a serial.
  - If the resource is published in frequent editions, it must have a designation (e.g., date, numeric edition statement) that could be used as numbering in order to be cataloged as a serial.

Examples	
MARC	<p>Example 2</p> <p>Situation: Numeric designation indicates that resource is a serial work</p> <p><b>362 0# \$a Jahrg. 1, Heft 1 (1999)-Jahrg. 16, Heft 2 (2014) .</b></p>

BIBFRAME	<p>Example 2</p> <p>Situation: Numeric designation indicates that resource is a serial work</p> <p>BIBFRAME Entity: Instance</p> <pre>bf:firstIssue&gt;Jahrg. 1, Heft 1 (1999) &lt;/bf:firstIssue&gt; &lt;bf:lastIssue&gt;Jahrg. 16, Heft 2 (2014) .&lt;/bf:lastIssue&gt;</pre>
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- Consider the [extension plan](#). If the resource indicates that it has a successive indeterminate extension plan (i.e., no predetermined conclusion of ongoing parts), catalog as a serial.
  - If the resource doesn't have such information, assume that a resource that has either of the following characteristics is a serial if it also meets the criteria given above for frequency and numbering.
  - The title proper implies continuing publication.
    - If the title proper includes words that imply continuing publication (e.g., “Advances in ...;” “Developments in ...;” “Progress in ...”), catalog as a serial.
    - If the issues also have analyzable titles, optionally analyze the issues as monographs instead of as a serial and record the common title as a series statement. See CCM 2.2 to understand more context. See also the instruction on [Hierarchical description](#).
  - A subscription can be placed for the resource.

Examples	
MARC	<p>Example 3</p> <p>Situation: Layout of numbering on title page and series title page indicates that it belongs to the title “Developments in radical humanism.” Volume title is analyzable: “Developments in radical humanism in the light of tragedy.”</p> <pre>245 00 \$a <b>Developments in radical humanism in the light of tragedy / \$c by Allan Chandler.</b></pre> <pre>490 00 \$a <b>Developments in radical humanism ; \$x Volume 13</b></pre>

BIBFRAME	<p>Example 3</p> <p>Situation: Layout of numbering on title page and series title page indicates that it belongs to the title “Developments in radical humanism.” Volume title is analyzable: “Developments in radical humanism in the light of tragedy.”</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;bf:mainTitle&gt;<b>Developments in radical humanism in the light of tragedy</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:responsibilityStatement&gt;<b>by Allan Chandler</b>&lt;/bf:responsibilityStatement&gt; &lt;bf:seriesStatement&gt;<b>Developments in radical humanism</b>&lt;/bf:seriesStatement&gt; &lt;bf:seriesEnumeration&gt;<b>Volume 13</b>&lt;/bf:seriesEnumeration&gt; </pre>
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## Serials cumulations

- Some serial cumulations are created by rearranging, correcting, and perhaps expanding individual issues for a certain period; the cumulation may or may not have the same title as the individual issues. The contents of the individual issues and the cumulation are basically the same.
- Do not confuse these cumulations with other serials that are publications with different frequencies and entirely different content, although the titles may be the same, e.g., an annual publication that gives the total figures for the year but does not include the monthly figures that appeared in the individual monthly issues. Separate records are generally made for these latter publications unless the numbering system ties them together.
- Make separate records if:
  - The individual and the cumulation have the same title but have different numbering systems, e.g., the individual issues have numeric designations but the cumulation has only a chronological designation.

Examples	
MARC	<p>Example 1</p> <p>Source information: Monthly except July and August</p> <p>245 00 \$a Law book guide.</p> <p>310 ## \$a Monthly (except July and Aug.)</p> <p>362 0# \$a Vol. 1, no. 1 (Jan. 1973)-</p> <p>Source information: Annual</p> <p>245 00 \$a Law book guide.</p> <p>310 ## \$a Annual</p> <p>362 0# \$a 1973-</p>
BIBFRAME	<p>Example 1</p> <p>BIBFRAME Entity: Instance</p> <p>Source information: Monthly except July and August</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Law book guide.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;Law book guide&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;Monthly (except July and     Aug.)&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; &lt;/bf:frequency&gt; &lt;bf:firstIssue&gt;Vol. 1, no. 1 (Jan. 1973)&lt;/bf:firstIssue&gt; </pre>

- Make separate records if:
  - The individual issues and the cumulation have different titles and separate numbering systems

Examples	
MARC	<p>Example 2</p> <p>Source information: Monthly</p> <p>245 00 \$a <b>Index medicus.</b></p> <p>310 ## \$a <b>Monthly</b></p> <p>362 1# \$a <b>Began with new series, volume 1, number 1 (January 1960).</b></p> <p>Source information: Annual</p> <p>245 00 \$a <b>Cumulated Index medicus.</b></p> <p>310 ## \$a <b>Annual</b></p> <p>362 1# \$a <b>Began with volume 1 (1960).</b></p>
BIBFRAME	<p>Example 2</p> <p>BIBFRAME Entity: Instance</p> <p>Source information: Annual</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Cumulated Index     medicus.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Cumulated Index     medicus</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;<b>Annual</b>&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; &lt;/bf:frequency&gt; &lt;bf:firstIssue&gt;<b>Began with volume 1 (1960)</b>&lt;/bf:firstIssue&gt; </pre>

- Generally do not make separate records if:
  - The individual issues and the cumulation have a continuous numbering system; the cumulation may or may not have a different title. Include an access point if the cumulation has a different title.

Examples	
MARC	<p>Example 3</p> <p>245 00 \$a International nursing index.</p> <p>310 ## \$a Quarterly, the 4th issue being an annual cumulation</p> <p>362 1# \$a Began with Vol. 1, no. 1 (Jan. 1966).</p> <p>Example 4</p> <p>245 00 \$a Quarterly economic review / \$c European Bank for Reconstruction and Development.</p> <p>246 1# \$i Year-end issue replaced by: \$a Annual economic review</p> <p>310 ## \$a Quarterly</p>
BIBFRAME	<p>Example 3</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;International nursing     index.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;International nursing     index&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;Quarterly, the 4th issue being an     annual cumulation&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; </pre>

	<pre>&lt;/bf:frequency&gt; &lt;bf:firstIssue&gt;<b>Began with Vol. 1, no. 1 (Jan. 1966)</b> .&lt;/bf:firstIssue&gt;</pre>
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- Generally do not make separate records if:
  - The individual issues and the cumulation have the same title, have only chronological designations, and the cumulation is published in lieu of the last individual issue.

Examples	
MARC	<p>Example 5</p> <p>Situation: Quarterly; the first three issues called Jan./Mar. 1974-July/Sept. 1974; the fourth issue, an annual cumulation, called 1974</p> <pre>110 2# \$a Library of Congress .  245 10 \$a Library of Congress name headings with references .  310 ## \$a Quarterly, the fourth issue being an annual cumulation  362 1# \$a Began with the Jan./Mar. 1974 issue .</pre>
BIBFRAME	<p>Example 5</p> <p>Situation: Quarterly; the first three issues called Jan./Mar. 1974-July/Sept. 1974; the fourth issue, an annual cumulation, called 1974</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:agent&gt;   &lt;bf:Agent&gt;     &lt;rdfs:label&gt;<b>Library of Congress</b>&lt;/rdfs:label&gt;   &lt;/bf:Agent&gt; &lt;/bf:agent&gt; &lt;bf:title&gt;   &lt;bf&gt;Title&gt;     &lt;bf:mainTitle&gt;<b>Library of Congress name headings with references</b>&lt;/bf:mainTitle&gt;</pre>

	<pre> &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;<b>Quarterly, the fourth issue being an annual cumulation</b>&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; &lt;/bf:frequency&gt; &lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdf:type rdf:resource="http://id.loc.gov/vocabulary/mnotety pe/number"/&gt;     &lt;rdfs:label&gt;<b>Began with the Jan./Mar. 1974 issue.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt; </pre>
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- When in doubt, prefer separate records.

## Serials issued in parts

- Generally make separate records if:
  - The individual parts are unnumbered or otherwise undesignated as parts of one serial

Examples	
MARC	<p>Example 1</p> <p>Situation: The operating review and the financial report are two parts that make up the airline's annual report</p> <pre> 110 2# \$a Singapore Airlines.  245 10 \$a Annual report. \$p Operating review.  110 2# \$a Singapore Airlines. </pre>



	245 10 \$a Annual report. \$p Financial report.
BIBFRAME	<p>Example 1</p> <p>Situation: The operating review and the financial report are two parts that make up the airline's annual report</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:agent&gt;   &lt;bf:Agent&gt;     &lt;rdfs:label&gt;Singapore Airlines.&lt;/rdfs:label&gt;   &lt;/bf:Agent&gt; &lt;/bf:agent&gt; &lt;/bf:title&gt; &lt;bf:Title&gt;   &lt;rdfs:label&gt;Annual report. Operating review.&lt;/rdfs:label&gt;   &lt;bf:mainTitle&gt;Annual report&lt;/bf:mainTitle&gt;   &lt;bf:partName&gt;Operating review&lt;/bf:partName&gt; &lt;/bf:Title&gt; &lt;/bf:title&gt;  &lt;bf:agent&gt;   &lt;bf:Agent&gt;     &lt;rdfs:label&gt;Singapore Airlines.&lt;/rdfs:label&gt;   &lt;/bf:Agent&gt; &lt;/bf:agent&gt; &lt;/bf:title&gt; &lt;bf:Title&gt;   &lt;rdfs:label&gt;Annual report. Operating review.&lt;/rdfs:label&gt;   &lt;bf:mainTitle&gt;Annual report&lt;/bf:mainTitle&gt;   &lt;bf:partName&gt;Financial report&lt;/bf:partName&gt; &lt;/bf:Title&gt; &lt;/bf:title&gt; </pre>

- Generally make separate records if:
  - The individual parts have their own numbering system

Examples	
MARC	<p>Example 2</p> <pre>245 00 \$a Chemical abstracts. \$p Chemical substance index.  362 1# \$a Began with 101 CS1 (Jan.-June 1984) .  245 00 \$a Chemical abstracts. \$p Formula index.  362 0# \$a 101 F1 (July-Dec. 1994) -</pre>
BIBFRAME	<p>Example 2</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;/bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Chemical abstracts. Chemical substance index&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;Chemical abstracts&lt;/bf:mainTitle&gt;     &lt;bf:partName&gt;Chemical substance index&lt;/bf:partName&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:firstIssue&gt;Began with 101 CS1 (Jan.-June 1984) .&lt;/bf:firstIssue&gt;  &lt;/bf:title&gt; &lt;bf:Title&gt;   &lt;rdfs:label&gt;Chemical abstracts. Formula index&lt;/rdfs:label&gt;   &lt;bf:mainTitle&gt;Chemical abstracts&lt;/bf:mainTitle&gt;   &lt;bf:partName&gt;Formula index&lt;/bf:partName&gt; &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:firstIssue&gt;101 F1 (July-Dec.1994)- &lt;/bf:firstIssue&gt;</pre>

- Generally make separate records if:

- The parts can be purchased separately
- Generally, do not make separate records if:
  - The individual parts do not have a numbering system that relates to the serial as a whole

Examples	
MARC	<p>Example 3</p> <p>Situation: Volumes for 1971 had numbering for its individual parts, which differed from the chronological designation of the serial as a whole.</p> <pre>245 00 \$a Who's who in computers and data processing. 362 1# \$a 1971- 515 ## \$a Vols. for 1971- issued in 3 parts. 515 ## \$a Some no. have parts called: Special publication.</pre>
BIBFRAME	<p>Example 3</p> <p>Situation: Volumes for 1971 had numbering for its individual parts, which differed from the chronological designation of the serial as a whole.</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Who's who in computers and data     processing.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;Who's who in computers and data     processing&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:firstIssue&gt;1971-&lt;/bf:firstIssue&gt; &lt;bf:note&gt;   &lt;bf&gt;Note&gt;     &lt;rdfs:label&gt;Vols. for 1971- issued in 3     parts.&lt;/rdfs:label&gt;</pre>

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<rdf:type
 rdfs:resource="http://id.loc.gov/vocabulary/mnotetype/issuance"/>
</bf:Note>
</bf:note>

<bf:note>
<bf:Note>
  <rdfs:label>Some no. have parts called: Special
publication</rdfs:label>
<rdf:type rdfs:resource=/>

</bf:Note>"http://id.loc.gov/vocabulary/mnotetype/
issuance"
</bf:note>
    
```

- Generally, do not make separate records if:
  - The parts have a continuous pagination or enumeration
- Generally, do not make separate records if:
  - The parts cannot be purchased separately
  - The parts appear to be designed to be used together (e.g., many law publications)
- When in doubt, prefer separate records.

**Serials that have selected issues published separately**

- Several publishers (e.g., Haworth Press, Pergamon Press) publish separate hardcover or softcover editions of selected issues of their periodicals.
- Do not consider such a separately published issue to constitute an integral part of the periodical, i.e., do not consider it merely an analyzable issue of the periodical. Create a separate record for the separately published issue. In the bibliographic record, give the pertinent information as a note, not as a series statement.

Examples	
MARC	Example 1

	<p>Situation: Selected issue is cataloged on its own description, but has a note about relationship to parent serial</p> <p><b>500 ## \$a Published also as v. 17, no. 1/2, 1993 of the Cataloging and classification quarterly.</b></p>
BIBFRAME	<p>Example 1</p> <p>Situation: Selected issue is cataloged in its own description, but has a note about relationship to parent serial</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>Published also as v. 17, no. 1/2, 1993 of the Cataloging and classification quarterly.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre>

### Reprinted issues of non-newspaper serials

- Separate records are generally made for reprinted serials if the reprinted issues are published by a publisher not responsible for the original.
- Separate records are generally not made for reprinted serials if the serial issues are reprinted by the publisher of the original.
  - If these issues carry a different or an additional title, add a note on the record for the original and provide an added entry.

Examples	
MARC	<p>Example 1</p> <p><b>130 0# \$a Jane's fighting ships</b></p> <p><b>260 ## \$a London : \$b Sampson Low, Marston and Co., \$c 1916-</b></p>

	<p>245 00 \$a <b>Jane's fighting ships.</b></p> <p>260 ## \$a <b>New York</b>, \$b <b>Arco</b> \$c [1969-]</p> <p>500 ## \$a <b>Reprint.</b></p> <p>775 1# \$t <b>Jane's fighting ships</b> \$w (DLC) 07025192 \$w (OCoLC) 6929748</p>
BIBFRAME	<p>Example 1</p> <p>BIBFRAME Entity: Work</p> <pre>&lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;bf:mainTitle&gt;<b>Jane's fighting ships</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt;</pre> <p>AND,</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:provisionActivity&gt;   &lt;bf:ProvisionActivity&gt;     &lt;rdf:type rdf:resource="http://id.loc.gov/ontologies/bibframe/ Publication"/&gt;     &lt;bf:place&gt;       &lt;bf:Place&gt;         &lt;rdfs:label&gt;<b>London</b>&lt;/rdfs:label&gt;       &lt;/bf:Place&gt;     &lt;/bf:place&gt;     &lt;bf:agent&gt;       &lt;bf:Agent&gt;         &lt;rdfs:label&gt;<b>Sampson Low, Marston and Co.</b>&lt;/rdfs:label&gt;       &lt;/bf:Agent&gt;     &lt;/bf:agent&gt;     &lt;bf:date&gt;<b>1916-</b>&lt;/bf:date&gt;   &lt;/bf:ProvisionActivity&gt; &lt;/bf:provisionActivity&gt;</pre> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:title&gt;   &lt;bf:Title&gt;</pre>

```

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    <bf:mainTitle>Jane's fighting
ships</bf:mainTitle>
  </bf:Title>
</bf:title>
<bf:provisionActivity>
  <bf:ProvisionActivity>
    <rdf:type
rdf:resource="http://id.loc.gov/ontologies/bibframe/
Publication"/>
    <bf:place>
      <bf:Place>
        <rdfs:label>New York</rdfs:label>
      </bf:Place>
    </bf:place>
    <bf:agent>
      <bf:Agent>
        <rdfs:label>Arco</rdfs:label>
      </bf:Agent>
    </bf:agent>
    <bf:date>1969-</bf:date>
  </bf:ProvisionActivity>
</bf:provisionActivity>
<bf:note>
  <bf>Note>
    <rdfs:label>Reprint.</rdfs:label>
  </bf>Note>
</bf:note>

```

LC practice: When the Library of Congress acquires reprinted issues of a serial title to fill in gaps in its holdings of the original, a separate bibliographic record for the reprinted issue(s) will not be created.

## Newspapers

- LC practice: LC's records of U.S. newspapers in microform follow the guidelines of the United States Newspaper Program (USNP). USNP is not required to follow the CONSER practice of creating separate records for U.S. titles in microform, but generally uses the "master record convention" to account for the various physical forms in which a newspaper is held. The bibliographic record describes the newspaper as it was originally published. The physical format, whether original newsprint, microform, or reprint, is described in the Copy Field of the OCLC local data record.

## Integrating resource?

- In case of doubt about mode of issuance, apply the following guidelines:
  - If the decision has been narrowed down to “serial vs. integrating resource” and the resource has wording that refers to “edition,” determine if that wording represents a numeric designation or an edition statement.
    - If it is a numeric designation, catalog the resource as a serial.
    - If it is an edition statement, catalog the resource as an integrating resource.
  - If the decision has been narrowed down to “monograph vs. integrating resource,” determine the likelihood of updates.
    - Catalog the resource as an integrating resource if there is a likelihood the resource will be updated (i.e., assume the updates will not be discrete).
    - Catalog the resource as a monograph if there is no indication that the resource will ever be updated.

Examples	
MARC	<p>Example 1</p> <p>Situation: Clear indication of regular updating with “Browse Collections” dropdown. Each Collection has a clear year/season designation and meeting number.</p> <pre>245 00 \$a ACS Division proceedings online. \$p Division of polymeric materials : \$b science and engineering.</pre> <pre>588 ## \$a Description based on: Meeting 221 (spring 2001); title from table of contents page (ACS website, viewed Oct. 15, 2008).</pre> <pre>588 ## \$a Latest issue consulted: Meeting 236 (fall 2008) (ACS website, viewed Oct. 15, 2008).</pre>
BIBFRAME	<p>Example 1</p> <p>Situation: Clear indication of regular updating with “Browse Collections” dropdown. Each Collection has a clear year/season designation and meeting number.</p>



## BIBFRAME Entity: Instance

```

<bf:title>
  <bf:Title>
    <rdfs:label>ACS Division proceedings online.
    Division of polymeric materials : science and
    engineering.</rdfs:label>
    <bf:mainTitle>ACS Division proceedings
    online</bf:mainTitle>
    <bf:subtitle>science and
    engineering</bf:subtitle>
    <bf:partName>Division of polymeric
    materials</bf:partName>
  </bf:Title>
</bf:title>
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  <bf:Note>
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    (spring 2001); title from table of contents page
    (ACS website, viewed Oct. 15, 2008).</rdfs:label>
    <rdf:type
    rdfs:resource="http://id.loc.gov/vocabulary/mnotet
    ype/descsource"/>
  </bf:Note>
</bf:note>
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  <bf:Note>
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    (fall 2008) (ACS website, viewed Oct. 15,
    2008).</rdfs:label>
    <rdf:type
    rdfs:resource="http://id.loc.gov/vocabulary/mnotet
    ype/descsource"/>
  </bf:Note>
</bf:note>

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**Electronic resources**

- If the resource was/is published in print, make the decision to catalog the electronic resource as a serial, integrating resource, or monograph based on the electronic resource itself, not on how it was issued in print.

- Information about the planned type of issuance may be given in the resource's "read me" files, etc.
- Catalog as a serial:
  - Remote access resource: a resource having material added as discrete, usually numbered issues (an "issue" can consist of a single article). The resource might contain a listing of back volumes, back issues, images of journal covers for sequential issues; only the current issue may be available as a separate issue.
  - Direct access resource: a resource whose carrier is issued successively (this situation is analogous to a print serial whose latest volume supersedes any earlier volumes). Note that such resources can be mounted on networks such that the successive issuance of the carrier is not observable to the cataloger or end user; when contributing cataloging in a shared environment (e.g., bibliographic utility), the record should reflect the carrier and mode of issuance as published.
- Catalog as an integrating resource:
  - Remote access resource: a resource having material added, changed, or deleted via updates that do not remain discrete (e.g., might contain articles from more than one journal).
  - Direct access resource: no direct access resource can be issued as an integrating resource (assumption that would be changed if proven incorrect).
- Catalog as a monograph:
  - Remote or direct access resource: a resource complete in one part or intended to be complete in a finite number of parts, including those resources that are corrected via "errata" information.

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## Resources issued in loose-leaf format

- A loose-leaf service is a publication issued in several component parts, often in a combination of updating loose-leaf and bound volumes containing both primary and secondary source material. Sometimes a loose-leaf service is called a reporter.
- Generally, create only one bibliographic record for the service as a whole; consider the service as a whole to be an integrating resource. In a note, list the component parts in enough detail to identify them. Give any volume designation that is found on a part. Optionally, include numeric or chronological designations of newsletters, bulletins, etc., within the service.
  - If, by exception, separate records are being created for the component parts, identify each part as an updating loose-leaf, multipart monograph, etc., and catalog it accordingly. In a note, indicate the relationship to the parent loose-leaf service and give an authorized access point for the loose-leaf service.
- When deciding to catalog a bibliographic resource issued in loose-leaf format as a serial, an integrating resource, or a monograph, make the decision based on the mode of issuance of the primary component.

- If there is a stated frequency, determine if the frequency applies to the primary component or to any updates.
- Catalog as a serial:
  - Resource otherwise meeting definition of serial whose issues remain discrete even though they are to be stored in a binder (as successive sections in the binder or subdivided/filed into separate sections in the binder).
  - Resource whose binders are issued successively even though the contents filed into each binder may be updated in integrating fashion until the next binder is issued.
- Catalog as an integrating resource: Resource consisting of a binder or binders in which pages are added, removed, or replaced until the next edition of the resource is published or until complete.
- Catalog as a monograph: Resource complete as issued or intended to be complete in a finite number of parts.

Examples	
MARC	<p>Example 1</p> <p>Situation: Resource is a completed loose-leaf publication, cataloged as a monograph.</p> <p>245 10 \$a AIDS and the law / \$c David W. Webber, editor.</p> <p>264 #1 \$a New York : \$b Wiley Law Publications, \$c c1997.</p> <p>300 ## \$a xxxvi, 624 p. ; \$c 26 cm.</p> <p>525 ## \$a Kept up to date by pocket parts and supplements.</p> <p>Example 2</p> <p>Situation: Resource is a loose-leaf publication, cataloged as a monograph. Notes clarify the structure.</p> <p>500 ## \$a Originally issued in bound format and kept up to date by pocket supplements and revised volumes.</p> <p>500 ## \$a The service is divided into five parts: Treaties / by Jacob Mertens, Jr., and others (volume, loose-leaf); Code, current volume (loose-leaf) and bound volumes, 1954-1958-; Code commentary (volumes,</p>

	<p>loose-leaf); Regulations, current volume (loose-leaf) and bound volumes, 1954-196-; Rulings, current volume (loose-leaf) and bound volumes, 1954-1957-</p> <p>500 ## \$a Includes unnumbered volumes: Tables, Table of cases, Regulations preambles, Proposed regulations preambles, Current materials, Index, and Rulings.</p> <p>500 ## \$a Includes separately numbered Regulations volumes (1985- ). Regulations volumes continued by Mertens federal tax regulations which consists of: regulations issued annually in softbound format; Regulations preambles; Proposed regulations preambles; Current developments and status table.</p> <p>500 ## \$a Includes "Complete internal revenue code" issued as soft-bound supplement.</p>
BIBFRAME	<p>Example 1</p> <p>Situation: Resource is a completed loose-leaf publication, cataloged as a monograph.</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;AIDS and the law&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;AIDS and the law&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:responsibilityStatement&gt;David W. Webber,   editor&lt;/bf:responsibilityStatement&gt; &lt;bf:provisionActivity&gt;   &lt;bf:ProvisionActivity&gt;     &lt;rdf:type   rdf:resource="http://id.loc.gov/ontologies/bibframe/Publication"/&gt;     &lt;bf:place&gt;       &lt;bf:Place&gt;         &lt;rdfs:label&gt;New York&lt;/rdfs:label&gt;       &lt;/bf:Place&gt;     &lt;/bf:place&gt;     &lt;bf:agent&gt;       &lt;bf:Agent&gt; </pre>

	<pre>       &lt;rdfs:label&gt;<b>Wiley Law Publications</b>&lt;/rdfs:label&gt;     &lt;/bf:Agent&gt;   &lt;/bf:agent&gt;   &lt;bf:date&gt;<b>c1997</b>&lt;/bf:date&gt; &lt;/bf:ProvisionActivity&gt; &lt;/bf:provisionActivity&gt; &lt;bf:extent&gt;   &lt;bf:Extent&gt;     &lt;rdfs:label&gt;<b>xxxvi, 624 p.</b>&lt;/rdfs:label&gt;   &lt;/bf:Extent&gt; &lt;/bf:extent&gt; &lt;bf:dimensions&gt;<b>26 cm.</b>&lt;/bf:dimensions&gt;  AND,  BIBFRAME Entity: Work  &lt;bf:supplementaryContent&gt;   &lt;bf:SupplementaryContent&gt;     &lt;rdfs:label&gt;<b>Kept up to date by pocket parts and supplements.</b>&lt;/rdfs:label&gt;   &lt;/bf:SupplementaryContent&gt; &lt;/bf:supplementaryContent&gt;  Example 2  Situation: Resource is a loose-leaf publication, cataloged as a monograph. Notes clarify the structure.  BIBFRAME Entity: Work  &lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>Originally issued in bound format and kept up to date by pocket supplements and revised volumes.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt; </pre>
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- If a component is lacking, give such information in a note.

Examples

MARC	<p>Example 3</p> <p>500 ## \$a Library of Congress lacks section: Mining. \$5 DLC</p>
BIBFRAME	<p>Example 3</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;Library of Congress lacks section:       Mining.&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre>

- Pamphlets/paperbacks
  - Current information of temporary or permanent value may be published also in pamphlet or paperback form and be distributed to subscribers of a loose-leaf service as part of the subscription. Such publications are keyed to a section or a service or to several services. In addition to individual, distinctive titles, they carry also the title of the service and the numbering of a section of the service (usually a supplementary bulletin, to which is added a further distinguishing characteristic such as the words “Extra,” “Section 2,” etc. (e.g., “Bulletin 35, Extra” or “Report bulletin 24, Volume LIII (Section 2)”).
  - Although these publications are often indexed in the service, they are unsuitable for filing into the service. If such a publication is considered of permanent value, create a separate record. Apply cataloger judgment about including a note in the bibliographic record indicating a relationship to the loose-leaf service and about giving an authorized access point for the service.
  - PCC practice: At first, these publications may appear to be volumes in a monographic series because there is a comprehensive title (the title of the loose-leaf service), a type of numbering, a volume title. To avoid confusion, create a series-like phrase series authority record; use the titles of the service and of the section of the service in the 1XX field and give instructions for handling the materials in a note.

Examples

MARC	<p>Example 4</p> <p>Series authority record:</p> <p>130 #0 \$a Tax ideas. \$p Bulletin</p> <p>667 ## \$a A separately numbered section of the loose-leaf service "Tax ideas." Bulletins issued in loose-leaf format are filed as a section of the parent loose-leaf. Catalog separately any material published in pamphlet or paperback form that carries the additional designation "Section 2;" apply cataloger judgment about giving a note in the bibliographic record indicating a relationship to the parent loose-leaf and about giving an authorized access point for the parent loose-leaf.</p>
BIBFRAME	<p>Series authority records will continue to be created and maintained in the NAF using MARC 21 coding and syntax.</p>

- Sections with independent numeric or chronological designations: bulletins, newsletters, etc.
  - Latest developments in a particular field are often reported and analyzed in special sections of a loose-leaf. These sections are typically called Bulletin, Newsletter, Report bulletin, Report, etc., and are for the most part indexed in the loose-leaf. They carry a numeric or chronological designation of their own. Information of permanent value from these selections is often later included in the main text and old issues can be periodically discarded or transferred.
  - Do not create a separate record for such a section. Instead, on the bibliographic record for the updating loose-leaf, give a note explaining the inclusion of any separately numbered and separately titled section. Give an appropriate access point for the section.

Examples	
MARC	<p>Example 5</p> <p>500 ## \$a Includes separately numbered section: Report bulletin.</p>

	<p>740 02 \$a Report bulletin.</p> <p>500 ## \$a Includes separately numbered bulletin: Criminal law advocacy reporter.</p> <p>740 02 \$a Criminal law advocacy reporter.</p>
BIBFRAME	<p>Example 5</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>Includes separately numbered bulletin: Criminal law advocacy reporter.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre> <p>AND,</p> <p>BIBFRAME Entity: Work</p> <pre>&lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Criminal law advocacy reporter.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Criminal law advocacy reporter.</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt;</pre>

- Transfer volumes
  - A transfer volume is a bibliographic unit containing material of a permanent nature originally issued as a section or binder of a loose-leaf service. The material is transferred from the loose-leaf mode by one of the following methods: the material is reissued by the publisher in bound form and sent to the subscriber as part of a subscription or made available for separate purchase; the material is transferred from the original loose-leaf mode to permanent binders (sometimes supplied by the publisher) or bound separately by the subscriber.



- Generally, do not create a separate bibliographic record for the transfer material. Instead, on the bibliographic record for the updating loose-leaf, give a note explaining the inclusion of transfer material of permanent value. If the transfer section has a title of its own in its transferred/bound stage, cite the title in the note and give an access point.

Examples	
MARC	<p>Example 6</p> <p>500 ## \$a Material of permanent value is removed periodically and bound in separate volume.</p> <p>500 ## \$a Prebound, separately numbered volumes with Administrative law decisions, containing reports of decisions of the Administrative Appeals Tribunal, periodically replace the reports and decisions in the section entitled Administrative law decisions.</p> <p>740 02 \$a Administrative law decisions.</p>
BIBFRAME	<p>Example 6</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;Material of permanent value is removed periodically and bound in separate volume.&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt; &lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;Prebound, separately numbered volumes with Administrative law decisions, containing reports of decisions of the Administrative Appeals Tribunal, periodically replace the reports and decisions in the section entitled Administrative law decisions.&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; </pre>

	<pre> &lt;/bf:note&gt;  AND,  BIBFRAME Entity: Work  &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Administrative law decisions.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Administrative law decisions</b>&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; </pre>
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- If a separate bibliographic record is created for the transfer material, include a note explaining the relationship to the updating loose-leaf.

Examples	
MARC	<p>Example 7</p> <pre> 245 00 \$a Environment reporter. \$p Cases.  500 ## \$a These volumes replace the opinions published in loose-leaf format in the "Decisions" binder of Environment reporter. </pre>
BIBFRAME	<p>Example 7</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;/bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Environment reporter. Cases&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Environment reporter</b>&lt;/bf:mainTitle&gt;     &lt;bf:partName&gt;<b>Cases</b>&lt;/bf:partName&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; </pre>

	<p>AND,</p> <p>BIBFRAME Entity: Work</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>These volumes replace the opinions published in loose-leaf format in the "Decisions" binder of Environment reporter.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre>
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## Conference publications

- Conference publications typically consist of the minutes, proceedings, etc., of a regularly-held meeting of one or more corporate bodies or are publications that contain the proceedings, etc., of ongoing topical conferences, symposia, or colloquia.

### LC practice:

- Catalog as serials ongoing conference publications that are being cataloged for the first time, unless they are covered by the exclusions listed in the next paragraph.
  - Consider a conference publication to be “ongoing” if:
    - words such as “first” or “annual” appear in conjunction with the name of the conference or the title of the publication, OR,
    - if multiple successive issues show that the publication is continuing in nature.
- Catalog as monographs those conference publications that are not ongoing or that:
  - have a title unique to each issue appearing on the preferred source of information (such unique titles are usually dedicated to a particular topic and vary from issue to issue and conference to conference; use judgment when determining if thematic or slogan-like phrases constitute unique titles and, therefore, warrant monographic treatment) AND/OR
  - are issued as part of a numbered monographic series.
- Once the decision to catalog as a monograph or as a serial is determined (based on the first or earliest issue of a conference publication), prefer to retain that decision.
- When there is a change in the authorized access point for a conference publication cataloged as a serial, consider the publication to be “new” and decide whether to catalog it as a monograph or as a serial according to the above criteria.

- When CONSER serial records exist for conferences represented by LC monograph records, LC serial catalogers will give “xlc” in the MARC 042 field and will not de-authenticate the records.

Examples	
MARC	<p>Example 1</p> <p>Monograph record</p> <p>245 00 \$a <b>Advances in materials and metallurgy</b> : \$b <b>Select proceedings of ICEMMM 2018</b> / \$c edited by A.K. Lakshminarayanan, Sridhar Idapalapati, M. Vasudevan.</p>
BIBFRAME	<p>Example 1</p> <p>BIBFRAME Entity: Instance</p> <pre>&lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Advances in Materials and     Metallurgy : Select Proceedings of ICEMMM     2018&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;<b>Advances in Materials and     Metallurgy</b>&lt;/bf:mainTitle&gt;     &lt;bf:subtitle&gt;<b>Select Proceedings of ICEMMM     2018</b>&lt;/bf:subtitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:responsibilityStatement&gt;<b>edited by A. K. Lakshminarayanan, Sridhar Idapalapati, M. Vasudevan</b>&lt;/bf:responsibilityStatement&gt;</pre>

## Supplements

- If the supplement can be used independently from the main resource, create a separate bibliographic record for it based on **its** mode of issuance and extension plan.
  - Do not catalog a dependent supplement as a serial just because it has a stated frequency (e.g., an annual supplement to a monograph).

## Supplements to serials

LC/PCC practice:

- Create a separate bibliographic record for a serial supplement to another serial if:
  - the supplement does not provide updates to the material of the related serial and
  - carries its own designation system that;
    - is distinct and independent from that used by the related serial, and,
    - has a common title that is identical to the title proper of the related serial.
  - Relate the two records.
    - On the bibliographic record for the supplement, use a MARC 772 field for the related serial.
    - In addition, provide an authorized access point for the related serial unless the supplement has a common title that is identical to the title proper of the related serial.
    - On the bibliographic record for the related serial, give a MARC 770 field for the supplement.
- For other serials supplements, give a note about the material on the record for the main serials resource. Provide access points for the supplement whenever the titles are distinctive.
- If the supplement is a special number or monographic supplement to a serial, both numbered and unnumbered, treat it as a series statement on the bibliographic record.

Examples	
MARC	<p>Example 1</p> <pre>130 0# \$a Portland transcript (Portland, Me. : 1849) 580 ## \$a Published a monthly supplement called: Transcript monthly, beginning Jan. 1887. 770 08 \$t Transcript monthly</pre> <p>Example 2</p> <pre>245 00 \$a Políticas sociais.</pre>

	<p>525 00 \$a Some issues accompanied by supplement: Anexo estatístico.</p> <p>740 02 \$a Anexo estatístico</p> <p>Example 3</p> <p>245 00 \$a Plerus.</p> <p>580 ## \$a Has supplement: Cuaderno de Plerus, 1993-</p> <p>770 1# \$a Cuaderno de Plerus \$w (DLC) sn 97036870 \$w (OCoLC) 33253841</p> <p>245 00 \$a Cuaderno de Plerus.</p> <p>730 1# \$t Plerus.</p>
BIBFRAME	<p>Example 3</p> <p>BIBFRAME Entity: Work</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Plerus.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;Plerus&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:note&gt;   &lt;bf&gt;Note&gt;     &lt;rdfs:label&gt;Has supplement: Cuaderno de Plerus, 1993-&lt;/rdfs:label&gt;   &lt;/bf&gt;Note&gt; &lt;/bf:note&gt; &lt;bf:supplement&gt;   &lt;bf:Work&gt;     &lt;bflc:aap/&gt;     &lt;bflc:aap-normalized/&gt;     &lt;bf:hasInstance&gt;       &lt;bf:Instance&gt;         &lt;bf:title&gt;           &lt;bf:Title&gt; </pre>

	<pre>       &lt;bf:mainTitle&gt;Cuaderno de <b>Plerus</b>&lt;/bf:mainTitle&gt;     &lt;/bf:Title&gt;   &lt;/bf:title&gt;   &lt;bf:identifiedBy&gt;     &lt;bf:Lccn&gt;       &lt;rdf:value&gt;sn 97036870&lt;/rdf:value&gt;       &lt;bf:assigner&gt;         &lt;bf:Agent rdf:about="http://id.loc.gov/vocabulary/organizati ons/dlc"&gt;           &lt;bf:code&gt;DLC&lt;/bf:code&gt;         &lt;/bf:Agent&gt;       &lt;/bf:assigner&gt;     &lt;/bf:Lccn&gt;   &lt;/bf:identifiedBy&gt;   &lt;bf:identifiedBy&gt;     &lt;bf:Identifier&gt;       &lt;rdf:value&gt;33253841&lt;/rdf:value&gt;       &lt;bf:assigner&gt;         &lt;bf:Agent&gt;           &lt;bf:code&gt;OCoLC&lt;/bf:code&gt;         &lt;/bf:Agent&gt;       &lt;/bf:assigner&gt;     &lt;/bf:Identifier&gt;   &lt;/bf:identifiedBy&gt; &lt;/bf:Instance&gt; &lt;/bf:hasInstance&gt; &lt;/bf:Work&gt; &lt;/bf:supplement&gt; </pre>
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#### LC practice:

- Create separate records for a main work and a supplementary work if:
  - the supplementary work is not issued at the same time as the main work, or
  - if it shows important differences in titles or statements of responsibility from those appearing in the main work.
- Catalog separately all supplements, etc., to serials except for:
  - Indexes
  - Supplements, etc. that have titles that are more like descriptions rather than true titles, or if the supplement, etc., is only usable in conjunction with the main work
  - Separately cataloged supplements, etc., should be related to the main work following the guidance in [MG: Relationships: WEMI-WEMI](#), Series (monographs, serials, and integrating works).

Examples	
MARC	<p>Example 4</p> <p>Situation: Supplement to the serial <i>Word</i> has numbering of its own.</p> <p><b>490 1# \$a Supplement to Word ; \$v monograph number 3</b></p> <p>NOTE: LC would not trace the series.</p> <p>Example 5</p> <p>Situation: <i>Malaysian journal of tropical geography</i> has a special number issue with no numbering.</p> <p><b>490 1# \$a Special number of Malaysian journal of tropical geography</b></p> <p>NOTE: LC would not trace the series.</p>
BIBFRAME	<p>Example 4</p> <p>Situation: Supplement to the serial <i>Word</i> has numbering of its own.</p> <p>BIBFRAME Entity: Instance</p> <p><code>&lt;bf:seriesStatement&gt;Supplement to Word ; monograph number 3&lt;/bf:seriesStatement&gt;</code></p> <p>NOTE: LC would not trace the series.</p>

## Indexes to serials

- In most cases, catalog an index to a serial via an unstructured description (i.e. a note) on the bibliographic record for the serial being indexed.
- Create a separate bibliographic record (monograph or serial as appropriate) for the index if:
  - the index is published separately and
  - the index is not issued by the entity responsible for the serial being indexed.



- Create a separate bibliographic record also whenever the index covers two or more different serials. (A serial represented by one or more descriptions (e.g., a serial with two bibliographic records due to a major change in title (see [MG: Serial Work and Integrating Work Decisions](#)/Major/Minor changes in the title proper)) is regarded as one serial for this situation.)

## Republications

- Generally, catalog a republication of a serial as a serial. However, catalog the following as a monograph:
  - a republication of a single issue or a limited number of issues.
  - a collection of bibliographically unrelated serials or articles.
- Republication of a monograph: Catalog as a monograph.
- Republication of an integrating resource: Catalog as a monograph or as an integrating resource based on the type of issuance of the republication.

## Printed travel guides

- When deciding whether to catalog a printed travel guide as a serial or as a monograph and there is no information about the likelihood that it will be continued indefinitely, apply the following guidelines:
- Generally, catalog a travel guide as a serial if it is general in scope because such guides usually are continued indefinitely.
  - “General in scope” means the guide contains a variety of current information, e.g., about where to go, where to stay, and what to do.
  - Apply this policy to state, region, or country guides for the United States, to region or country guides for other countries, and to guides for major cities.
  - If a numeric or chronological designation is not available, supply a chronological designation based on the publishing or copyright date.
- In case of doubt, catalog as a monograph.

Examples	
MARC	<p>Example 1</p> <p>Situation: Guidebook published every two to three years consistently, so cataloged as a serial.</p>

	<p>245 00 \$a Fiji.</p> <p>310 ## \$a Every two or three years.</p>
BIBFRAME	<p>Example 1</p> <p>Situation: Guidebook published every two to three years consistently, so cataloged as a serial.</p> <p>BIBFRAME Entity: Instance</p> <pre> &lt;bf:title&gt;   &lt;bf:Title&gt;     &lt;rdfs:label&gt;Fiji.&lt;/rdfs:label&gt;     &lt;bf:mainTitle&gt;Fiji&lt;/bf:mainTitle&gt;   &lt;/bf:Title&gt; &lt;/bf:title&gt; &lt;bf:frequency&gt;   &lt;bf:Frequency&gt;     &lt;rdfs:label&gt;Every two or three years&lt;/rdfs:label&gt;   &lt;/bf:Frequency&gt; &lt;/bf:frequency&gt; </pre>

## Other printed resources

- After determining that the printed bibliographic resource is published in successive parts, and
  - there is no information that the resource will be complete in a finite number of parts, AND
  - it is not Electronic resources, Loose-leaf resources, Conference publications, Supplements, Republications, or Printed travel guides,
  - generally follow the decision to catalog as a monograph or as a serial for the specific categories in the two lists below.
- If the printed resource isn't represented by one of the categories below, catalog as a serial.
- Catalog as monographs:
  - books "issued in parts" (fascicles)
  - cartographic materials
  - censuses
  - encyclopedias

- hearings
- publications of five-year plans
- Catalog as serials:
  - alumni directories
  - college catalogs
  - court reports
  - sales/auction catalogs
  - session laws

### Change from cataloging decision re: monograph vs. serial

- If there are one or more monograph bibliographic records in the catalog for editions of a resource and another edition is received, determine if the resource should be cataloged as a serial to save the time of continuing to prepare separate monograph records.
  - If the resource is a conference publication, see the instructions under Conference publications.
- Consider the following aspects when making the decision to recatalog as a serial:
  - the resource should have a designation (e.g., date, numeric edition statement) that could be used as numbering;
  - the frequency of the editions is one to two years (give greater consideration to continuing to catalog as monographs if the editions are published three or more years apart).
- LC practice: LC no longer routinely cancels completed records for monographs. The serial bibliographic record describes the entire serial.
  - Notes are added to the serial and monograph records to assist users and staff to locate all holdings for the resource in the library.

Examples	
MARC	<p>Example 1</p> <p>Note added to monograph record</p> <p><b>500 ## \$a Issues for 1996- cataloged as a serial in LC. \$5 DLC</b></p> <p>Note added to serial record</p>

	<p>500 ## \$a <b>Earlier issues, 1993-1995, cataloged as monographs in LC. \$5 DLC</b></p> <p>Example 2</p> <p>Note added to monograph record</p> <p>500 ## \$a <b>Editions for 1-2, 4, 6, 8- cataloged as a serial in LC. \$5 DLC</b></p> <p>Note added to serial record</p> <p>500 ## \$a <b>Editions for 3, 5, 7, cataloged as monographs in LC. \$5 DLC</b></p>
BIBFRAME	<p>Example 1</p> <p>BIBFRAME Entity: Instance</p> <p>Note added to monograph description</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>Issues for 1996- cataloged as a     serial in LC.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre> <p>Note added to serial description</p> <pre>&lt;bf:note&gt;   &lt;bf:Note&gt;     &lt;rdfs:label&gt;<b>Editions for 3, 5, 7, cataloged as     monographs in LC.</b>&lt;/rdfs:label&gt;   &lt;/bf:Note&gt; &lt;/bf:note&gt;</pre>

## Level of description

### Comprehensive description

- Definition: A comprehensive description is a metadata description that includes multiple units but describes the resources as a whole.
- Examples of resources that are generally described with a comprehensive description include:
  - Multipart monographs
  - Books with supplementary resource(s)
  - Serials
  - Integrating resources that are periodically updated
  - Collections of two or more units assembled by a person or institution other than the original creators (e.g., a private collection of printed theatre programs, a database of digital images compiled by a museum, an archive of personal papers)

LC practice:

- See the instructions under [Supplements](#) to decide whether or not to use a comprehensive description for a serial and related supplement.
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### Hierarchical description

- Definition: A hierarchical description is multiple metadata descriptions of a resource that consists of two or more parts. There is both a metadata description of the resource as a whole, as well as one or more metadata descriptions of one or more of the parts.
  - Do not create hierarchical descriptions.
  - If a resource already has a pattern of hierarchical descriptions, continue to follow that pattern for all newly received volumes. (E.g., *Historia de España (Espasa Calpe)*)
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### Analytical description

- Definition: An analytical description is a metadata description of a resource that is part of a whole. This means that an individual part, such as a single volume in a series, will have its own bibliographic record.

LC practice:

- See the instructions under [Supplements](#) to decide whether or not to use a comprehensive description for a serial and related supplement.
- For a resource in a series, record a Manifestation: series statement.

- If the metadata description is the result of original cataloging at LC, do not give a Work: authorized access point of work for the series.
  - For a resource that is not in a series, use cataloger's judgment to decide on referring to the Work: related work of work.
  - For two or more resources issued independently that have been subsequently placed together under one cover or comparable packaging, create separate bibliographic records and associate them with a structured description of the relationship Item: bound with (i.e., "With" notes).
  - For rare books issued universally as one physical volume by the publisher, etc., with separate title pages, separate pagination/foiation, and separate collation (i.e., signatures) for each work (see also [Descriptive Cataloging of Rare Materials \(Books\) \(DCRM\(B\) 7B18\)](#)), create separate bibliographic records and associate them with a structured description of the relationship Item: bound with (i.e., "With" notes).
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## Cataloger's Judgment Areas

- The decision of serial vs. monograph vs. integrating resource is very much an area of judgment, as the criteria for decisions are highly variable, not always clear, and may be in competition. There will not always be a clear and simple answer.
- Principles of consistent and easy access for the patron should be the foundation of the cataloger's decision.
- Local priorities must be taken into account.