

Agenda item

1. (continued from last conversation): To review unresolved issues identified at ALA Midwinter to identify issues that could be "fast-tracked"
See updated list (below) for comments
Action: MMB will create a matrix to compare P-N guidelines, RDA, etc., and the options for discussion. To distribute for comment Friday, April 12.
2. CONSER RDA Core Elements (dated July 2012)
Background: Becky Culbertson recently completed a comparison of the BSRs, LC PCC PSs, and CONSER Core Elements. This document (and the Checklist) identify RDA instructions as "CONSER Core" or "CONSER Core-if." This document will be incorporated eventually into the RDA Toolkit.
Question: Should the CONSER or CONSER Core-if designations be re-considered as LC or PCC or RDA core?
Discussion: Certain elements truly reflect CONSER decisions as distinct from RDA. However, many are PCC core.
Suggestion: Becky's document should be shared with CONSER (and BIBCO). Those instructions that reflect CONSER alone could retain the designation CONSER Core.

CONSER RDA Bridge Training

Outstanding issues for further discussion; updated 2/26/2013

GENERAL ISSUES

Transcription v. Recording

1. CONSER practice? Transcribe volume/issue designations w/dates in 588 and 362 rather than recording. Take what you see on the piece for the designations (w or w/o dates) in 588 and 362; captions are transcribed, numbers may be adjusted (existing guidelines)
[This issue is also under Numbering]

Provider-Neutral Record

1. P-N Guidelines – always provide term 1 online resource in 300 field for extent for ALL resources; will CONSER follow? [discussion, slide 61]
This issue could be fast-tracked.
UC Funnel discussion: Prefer 300 ## \$a 1 online resource (volumes)
2. Description Based On: note in integrating resources (Becky Culbertson) – provider neutral guidelines, etc. [see discussion, slide 31]
[vb comment: note that not all IRs are provider neutral, at least at this point, since IR2.1 restricts application "This policy is limited to remote access electronic resources that are available simultaneously from two or more different electronic service providers." So if a resource is not available from two or more providers, the p-n guidelines do not apply. Of course, the guidelines have not been re-written for RDA...]
Cannot be fast-tracked

Integrating Resource Record Melissa Beck

Conclusion: no candidates for fast-track.

Action: MMB will create a matrix to compare P-N guidelines, RDA, etc., and the options for discussion

1. When do the guidelines for provider-neutral records apply to IRs?
[Comment: Per LH, this question needs to be negotiated within PCC and the Standing Committee on Standards]
2. When the first iteration is *not* available at time of description, should the date of publication be coded in the 264 \$c?
[LH: Proposes including in RDA IR Manual a statement *not* to apply the last sentence of 2.8.6.5: do not supply ... if the first and/or last issue, part, or iteration is not available]
3. What information is needed when giving the source of title note for an online IR? How should the note be formulated?
Example: For an IR that began in 2008 and is now viewed February 11, 2013, and is based on the home page, should we expect to see:
500 ## \$a Title from home page (viewed February 11, 2013)
OR should we expect:
588 ## \$a Description based on contents viewed February 11, 2013; title from home page
[LH: Need negotiation/agreement on this- that hasn't happened]

CONSER Maintenance Melissa Beck

Conclusion: item #3 (and possibly item #2) are candidates for fast-track

1. What should CONSER catalogers be expected to change/add during record-by-record maintenance?
[discussion, slide 27]
2. Policy decision to encourage 33x fields, spelling out abbreviations, and 264 – make explicit for CONSER to add/edit? Encourage but not require
3. 260 conversion? – CAUTIOUS. Can always ADD 264, but 260 wasn't a transcribed element so converting to 264 is likely inappropriate
4. Mixed practice – how to define? Related to changes in publishers (260, 500, 264, etc.); leave as is, add your notes and move on.
[vb comment: This discussion related to slide 105, which has both a 260 field and a 500 Publisher: note. There was considerable variation of opinion on what was acceptable mixed practice, with several—including Shana—feeling that these notes should be converted. Robert Rendal preferred to "add your notes and move on."]
5. Further discussion about editing of pre-AACR maintenance: Proposal building on Interim TG report: Move 936 to DBO note; then edit/add as needed. Should this be part of permanent CONSER practice or should CONSER retain practice of maintaining pre-AACR2 records according to code at that time?

When to create a new description Adolfo Tarango

1. JSC approved change to always create a new description when changing to online from any other computer carrier (or any other carrier); what about simultaneous computer format and online format? As in, was CD-ROM and online starts publication – two records, two editions; different manifestations currently so already two records.
This could be fast-tracked for early-implementation, since JSC already approved the change.
2. Identification of situations when expressions require new description? Simultaneous expressions (e.g. complete translations)? What about when the preferred title has the translated title in it and that changes?

This needs discussion

Work authorized access point Renee Chin

1. ~~Is the preferred title and the title proper the same?~~ If there's a mark of omission at the beginning of the title proper, do you include it in the preferred title? ~~Authorized access point for the work is the creator (if present) and the preferred title.~~ What happens when you construct an authority record for the title? How do you cite this in the linking entry field?
May be a candidate for fast-track; but may discussion. Would be best to gather examples, to determine which cases involve loss of meaning when the ellipses are eliminated.
Consideration: One reason given during the discussion at ALA Midwinter for this to be considered an issue is that 780/785 citations omit initial ellipses. However, the 780/785 also omit initial articles, and we do not feel it necessary to create separate 130 work AAPs in those cases.
If fast-tracked, the proposal should include criterion of whether the resulting title makes sense (without ellipses).

Relationship designators for persons, families, and corporate bodies Becky Culbertson

Conclusion: no candidates for fast-track

1. Additional guidance for relationship designators – repeat the MARC field for different relationship designators OR only repeat the relationship designator subfield – currently catalogers judgment
2. Recommended to always use a relationship designator for creators of a work
3. RDA doesn't limit use of relationship terms to RDA list; can use the term or relationship designator list that is most appropriate for your resource; can also suggest additional terms to be added to list (publisher is an example of a term we would like added); relationship designators will be fast tracked through the Standing Committee on Standards for addition to RDA Appendices
4. 7xx fields and a 550 note: do you continue to do both if you start putting date information in the 7xx field? Or do you abandon the 550 note and just add additional 7xx fields with the date info going forward [with \$3]?

Relationship designators for work-expression-manifestation Becky Culbertson

Conclusion: no candidates for fast-track

1. Discussion of relator phrases for microformats; "reproduction of (manifestation)" isn't specific enough; 776 \$i – use 300 \$a terms? Discussion of relator phrases for online formats as well. What should CONSER best practice be?

How to catalog reproductions under RDA (need better guidelines)

BY MARC FIELD

022 Identifiers **Sarah Gardner**

1. ISSN in 022 \$y – move away from this to preferring 776 \$x? possibility of repeatable 022 with \$q qualifier?

Not a candidate for fast-track. However, since CONSER has already expressed a preference for 776 \$x in conjunction with CSR guidelines, should that be taken into account?

245 Transcription of title **Sarah Gardner**

Conclusion: no candidates for fast-track

1. Titles that consist solely of corporate bodies (slide 43) – also applies to personal names? E.g. exhibition catalogs, auction catalogs, etc.
What is a title page? If the opening page only has a corporate name, but the cover has a title, can we consider the cover to be the preferred source? If there is no preferred source with a "real" title can CONSER Catalogers devise a title? [discussion, slide 43]
2. 2.2.2.4 – use of brackets or a note for things such as devised titles? – do we need brackets around a title in a 245 when the title is created/devised by the cataloger? In addition to 500 note?
This appears to be Shana's notes rather than an unresolved issue for discussion.
3. Parallel titles – first one is core; additional parallel titles are optional
Is this an unresolved issue or simply a note from ALA Midwinter session?

264 Publisher, Distributor, Manufacturer **Valerie Bross**

Conclusion: no candidates for fast-track

1. Publisher name – don't omit hierarchies from publisher name – option to omit in RDA; CONSER core decision? Not a candidate for fast-track
2. Use of "place of publication varies" notes; still OK; cataloger's judgment?
Suggestion: If CONSER decides to retain "Place of publication varies" then add to the note, so that the fixed field Ctry element is easier to interpret. E.g.: Place of publication varies; latest place: [Place], [issue used for identification of place]

300

300 \$a Extent & \$c Dimensions Valerie Bross

1. 300 – use carrier type list for extent ; can use other commonly known terms ; CONSER recommendation? Not a candidate for fast-track
2. CD-ROM/DVD-ROM: 300 \$c – use of in. for some carriers; can use cm instead? – LC practice; CONSER Core elements is following LC practice; OLAC wants to use in. for media – PCC preferred practice?
Candidate for fast-track: Since both PCC and OLAC prefer to use inches as the measure, would make sense for CONSER to concur.
3. Prefer more broad generic term in 300 field; make notes about specific formats: Should this be a CONSER best practice? Not a candidate for fast-track

336/338 content, media, carrier (manifestation + expression) **Valerie Bross**

1. PCC guideline for 33x fields – include term *and* code? Only term is required, but code is optional. Should CONSER have a "best practice"? Not a candidate for fast-track

2. Should CONSER have best practices on whether to use the code? Should CONSER have best practices on whether to repeat or add fields during maintenance? [discussion, slide 63]
Not a candidate for fast-track
3. 33X fields – use \$3 for multiple content types; prefer to repeat the whole field or repeat just the subfield? PCC recommendation? Only current recommendation is to be consistent in practice throughout the record
Not a candidate for fast-track
4. **33X fields – formal update process to add a term to the list; are limited to the list; have use of “unspecified” or “other” if needed; record in singular b/c that’s how they appear in list in 33x fields; in 300 field can be plural (use 338 carrier type list)**
This is not really a question, but a recommendation to include the update process in CONSER documentation

362 Numbering Valerie Bross

Conclusion: no candidates for fast-track

1. Numbering – sources 2.6.1.2 – need to piece together? Follow past CONSER practice – look for most complete presentation of the numbering and preferring that; the 362 is a *note* field so have latitude to piece together or select most complete presentation
Not a candidate for fast-track
2. Supplying numbering for first issue when lacks numbering but later issues have numbering – are we limited to when we supply? Only when starts on 2nd issue? What if it starts at 4th issue? **Not a candidate for fast-track**
When is it ok to bracket initial numbering not on the piece but on subsequent issues, e.g., Began with [vol. 1, no. 1]? [discussion, slide 75]
3. When should we modify transcription to show the whole year; and when should we use the year as represented on the piece? [Based on slide in session 3b, showing “97-1” as the way to represent an issue that has numbering “1-97”; question: why not “1997-1”?]
Not a candidate for fast-track

588 Description based on same as IR Record question already considered by Melissa Beck

1. Re "DBO": What about IRs? Will CONSER catalogers use DBO for IRs? [discussion, slide 31]