Outcomes and action items from the CONSER Operations Representatives Meeting
May 6-7, 2010

Agenda with links to discussion documents: http://www.loc.gov/acq/conser/agenda-ops-2010.html

1. **"Punctuation:** *Everyone's Favorite Topic,"* Robert Bremer (OCLC): A proposal to drop the requirement for ISBD punctuation in catalog records.

Outcome: a PCC group should be formed to:
- Determine what additional MARC subfields will be needed, for example for subsequent statements of responsibility (being sure to check the MARBI archive to see what has been proposed in the past).
- Provide specifications for OCLC and vendors for removing/replacing punctuation. Vendors should be involved in this group and conversations about any record conversion projects that develop from it.

Action: The Operations Committee coordinators, Les and Carolyn will send the PCC Policy Committee a request to set up a PCC task group to explore the issues.

2. **OCLC Implementation plans for new MARC coding in May** are described in "Technical Bulletin 258 OCLC-MARC Format Update 2010 including RDA Changes" (TB 258): http://www.oclc.org/support/documentation/worldcat/tb/258/default.htm. OCLC will announce when users may add the new coding to records. Of particular interest to CONSER catalogers:

Form of Original Item (008/22 & 006/05):
o online
q direct access,
s electronic, still valid for any form of electronic resource. Codes o and q should be used to separately identify online and direct electronic resources

Form of item o online (008/23 & 006/06)
o online
q direct access,
s electronic, still valid for any form of electronic resource. Codes o and q should be used to separately identify online and direct electronic resources

588 Source of description
Used for "description based on note" (including when it is combined with source of title information) and "latest issue consulted note" for continuing resources.

Note: The field is scheduled for implementation in OCLC on May 23, 2010. LC asks CONSER members not to use the code until after June 1, 2010 to accommodate changes in LC's ILS.

040 subfield $e rda .
336-338: RDA codes for content, media, and carrier

Note: OCLC will announce when users may add RDA related codes to records.

3. The slide presentation used for the OCLC update is available from:
http://www.loc.gov/catdir/pcc/OCLCupdate2010.ppt [PowerPoint: 234 KB]

4. **PCC guidelines for multiple character sets:**

Comments were made on section 1.5.2 "Headings: Optional Practice." Some felt that allowing multiple options, especially for qualifiers in headings, leads to inconsistently constructed headings. Others were comfortable with the options for headings.

Outcome: There was no consensus on the options portion of the document, but a future survey of various language communities will shed more light on the viability of such options.

Action: Comments from the Operations meeting will be added to the multiple character set guidelines.

5. **Open Access Project Task Group Report:**

Outcomes:
* There was overall support for the project
* Representatives can't commit their institution's participation until they consult with their administrators
* The representatives set a deadline of June 30 2010 for letting Les know if their institution can participate

Action: Les will send workload estimates to the representatives so administrators can take this into account in their decision making.

6. CONSER affiliate representatives Melanie Watts of EBSCO Information Services, Kate Stewart of Proquest/Ulrich's and Kara Killough of Serials Solutions each gave an overview of how CONSER records interact with their company's services and fielded audience questions. Their presentations gave attendees a new understanding of the work they do and were very much appreciated by other CONSER representatives.

Action: An Elluminate session on the topic is planned in the near future.

7. **Lack of one-to-one correspondence between print and online records, due to differences between older and newer title change rules:**

The result is that several print records (created under *earlier* title change rules) exist with fewer corresponding records for the online version records (created under *later* title change rules). ISSN for the print versions assigned under earlier title change rules have been in the serials information and citation chain for a long time.

The 022 field is repeatable in MARC 21, the idea of making use of the field's repeatability has been raised before. Processing records with a repeated 022 would be a **very big change** for the ISSN Network. A mechanism to flag a repeated 022 is required.

Action: Regina agreed to explore repeatable 022 with the ISSN Network and develop some pros and cons to share with CONSER representatives.

8. **Linking fields:**

Problem 1: Whole/Part relationships are being linked in CONSER records with reciprocal 776 fields, but these really are not equivalent other formats. An example is a "mega disc" where one disc contains the content s of many journals. The group agreed that it is better to use reciprocal 787 to show these relationships.

Action: It was agreed that 787 should be used in these situations, it is ok to go ahead and start using this coding for these situations.
Action: Help is needed to identify and edit the sections in CEG and CCM documentation showing these whole part relationships. Three people volunteered to help with this task: Kevin Randall, Prima Casetta, and Steven Riel. Les will be in touch with these volunteers.

Problem 2: Print and online versions of a resource are simultaneous for some time. The print ceases and is continued by the online. How do we link these? We've changed our practices for this situation several times over the years as documented in CCM 31.16.1. Currently the CCM instructs the cataloger to include the related resource in both 780-785 and 776. In the past this section contained instructions to select the "primary" relationship and use one reciprocal link for the records.

Action: Les and Hien will get background on why how we changed this through the years and make this available on the web site.
Action: Regina will investigate ISSN related issues with having the multiple links with same ISSN, we will see what issues there may be with linking and ISSN before changing CCM 31.16.1

9. **Changes to Uniform Titles:** The wording in the CONSER standard record (CSR) sounds restrictive in this particular situation. We have a practice documented in CCM 21.6.3 that allowed this type of change in the past.

Decision: It's ok for a cataloger to make a reasoned decision to change the uniform title in a case like this, weighing the impact of changing the uniform title on linking fields and added entries in other records.

Action: Naomi Young and Kris Lindlan volunteered to consult with those who worked on the original documentation for the CSR (Steve Shadle and Diane Boehr were suggested) to find out what the original intent of this instruction was and suggest changes for the CSR wording.

10. **Making changes to authenticated AACR2 records:** Naomi Young and Kevin Randall discussed an example where an AACR2 record authenticated before implementation of CSR guidelines was changed to CSR style and formatting. Information was deleted in the process. The group agreed authenticated AACR2 records created before the CSR was implemented shouldn't be converted to conform to CSR guidelines. Use information on the record should not be removed.
Action: Les and Hien will schedule an Elluminate session to discuss this with CONSER catalogers further.

11. Coding of 246 for variant title (other than parallel title):

Decision: CONSER agreed to change the CSR for these variants from 246 13 to 246 1#. CSR practices for coding parallel titles will not change.
Action: Les and Hien will update the CSR MAP and cheat sheet.

12. **Records generated by the OCLC eContent Synchronization Program (OCLCE) for HathiTrust, Google Project, and future projects.**

Robert Bremer (OCLC) explained that records generated as part of OCLCE have a note: "eContent provider-neutral record in process." The automated merging of these records to delete duplicates may not actually start until sometime in 2011, so CONSER catalogers may select an appropriate record to authenticate (it need not be one of the HathiTrust or Google Project records if more appropriate copy is available) and report any duplicates to OCLC for deletion.

If a HathiTrust or Google Project record is being reported for deletion, OCLC will merge any data related to the projects that must be retained on the authenticated record:
- Registry of Digital Masters elements: 042=dlr, 506, 533, 538, and 583
- The numerous Google Project URLs.

Working with records generated by OCLCE:

- If multiple 776 fields were inappropriately generated on the related print record the CONSER cataloger may delete the 776 links to records not being retained.
- If ISSN center code $2 in the 022 was transferred from the print record during the clone, (assuming $a of the print record was moved to $y of the online record) may need to be removed to pass OCLC validation.
- Christopher Walker reported that HathiTrust has agreed to represent serials with one link on one record (unlike the multiple issue links on Google Project records). If you find multiple links on HathiTrust records, report them to HathiTrust

Action: the FAQ: Google Books Library Project Records [PDF: 20 KB; 1 p.] posted as a result of the 2009 Operations Representatives Committee meeting has been updated with information resulting from this years discussion.

13. **RDA Test**

Elmer Klebs, an LC serials cataloger involved in the RDA test, gave a demonstration of the RDA Toolkit, beta version. Judy Kuhagen (LC) said there is a "beta version task group" at ALA Publishing set up to handle comments on the beta version and incorporate changes in the final version. A guided tour of the RDA Toolkit is available from the RDA web site: http://www.rdatoolkit.org/training/guidedtour

Judy Kuhagen provided an overview of decisions LC made for the test. Several documents related to the test are available from: http://www.loc.gov/catdir/cpso/RDAtest/rdatest.html. General information is available from: http://www.loc.gov/bibliographic-future/rda/. An RDA test help email address has been set up: LChelp4rda@loc.gov.

Renette Davis (University of Chicago) shared information about her institution's decisions as an RDA test institution. The web site http://www.lib.uchicago.edu/staffweb/depts/cat/rda.html was developed for this and includes a timeline and RDA record examples. The record examples were created by converting existing AACR2 records according to the guidelines in the document "Changing AACR2 records to RDA records."

14. **ISSN**
Linking ISSN:
Scenario: The print record has 022 $a and $l in it. You are using the print record to clone an e-version record.

Decisions:
- You may keep the $l on the record for the e-version. Please move the $a (previously $a of the print record) to $y of the e-version record.
- If ISSN center code $2 in the 022 was transferred from the print record during the clone, it should be removed when the ISSN is moved from $a to $y to pass OCLC validation.
- Generally when cloning an e-version from the print record it does no harm to retain $l and $m from the print in the e-version.

Working with non-U.S. publications, the ISSN Portal and CONSER records:

Generally CONSER members with access to the ISSN Portal can record data from the ISSN records in CONSER records for non-U.S. publications.

For the most part title change decisions by the ISSN Network and CONSER (except for cases where a judgment call was deemed necessary) should be in synch for assignments and records created after 2003. If there are clear cases where the post 2003 ISSN assignment and a CONSER record for a non U.S. record are out of synch a CONSER member may contact the responsible ISSN Center directly to ask for clarification or

reevaluation of the assignment. Contact information for National ISSN Centers is available from: http://www.issn.org/2-22647-Contact-a-National-Centre.php

Action: Regina will provide further information from her PowerPoint with specific advice for CONSER catalogers in working with non-U.S. publications and data from the ISSN Portal.