Introduction to Cataloging Electronic Integrating Resources

An Online Training Presentation

From the Cataloging Policy Committee (CAPC)
of the Online Audiovisual Catalogers, Inc. (OLAC)

About this online training

- What it is and what it isn't
  - This online training presentation is meant to serve as **an introductory overview** to orient catalogers to the AACR2 rules and MARC codes which were new for integrating resources (IRs); it is not a detailed training tutorial.

- What it covers
  - Keeping with the mission and scope of OLAC, the focus is on **electronic IRs**, with an addendum on what is distinctive for print IRs (loose-leafs).

Type of Issuance

- With 2002 Revisions to AACR2, we now have **three types of issuance**:
    - **Monograph**
    - **Serial**
    - **Integrating**

- Serials and and Integrating Resources are grouped together under the broader umbrella category of **Continuing** Resources.

- See **LCRI 1.0** for guidance
    - LCRI 1.0 (former 12.0A) provides excellent guidance in making decisions about type of issuance for online and loose-leaf resources.
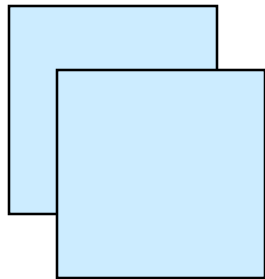   - Very helpful even for those who don't strictly follow LCRIs!

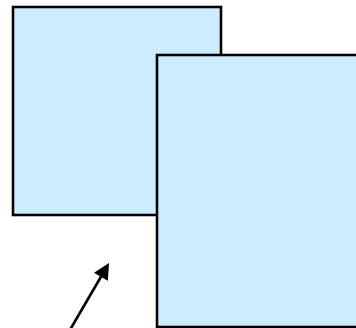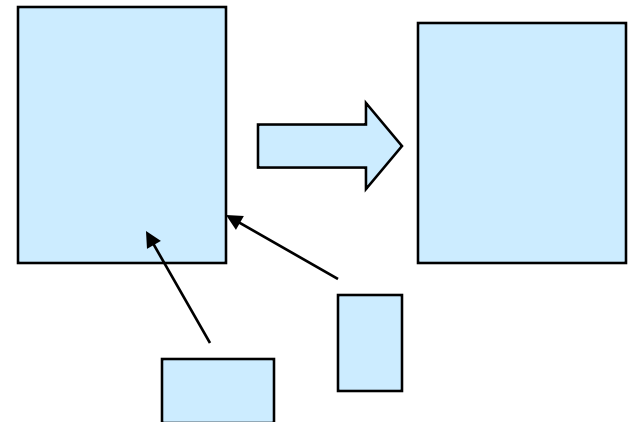# Representation of Bibliographic Resources in AACR2

Finite resources

Continuing resources

Monographs

Serials

Integrating resources

Multi-parts

Parts remain discrete

Updates do not remain discrete

Definition of Terms

- New and revised definitions in the 2002 Revision of AACR2 include:
  - Bibliographic Resource
  - Continuing Resource
  - Monograph
  - Serial
  - Integrating Resource
  - Iteration

Bibliographic Resources and Continuing Resources

- ## Bibliographic resource

  - An expression or manifestation of a work or an item that forms the basis for bibliographic description.
  - A bibliographic resource may be tangible or intangible.

- ## Continuing Resource:

  - A bibliographic resource **issued over time with no predetermined conclusion**.
  - Includes serials and ongoing integrating resources.

Monographs and Serials

- **Monograph:**
  - A bibliographic resource that is complete in one part or intended to be completed in a finite number of parts.

- **Serial:**
  - A continuing resource issued in **a succession of discrete parts**, usually bearing numbering, that has no predetermined conclusion.
  - Examples include journals, magazines, electronic journals, continuing directories, annual reports, newspapers, and monographic series.

Integrating Resource

- A bibliographic resource that is added to or changed by means of **updates that do not remain discrete** and are <u>integrated</u> into the whole. Integrating resources can be either finite or continuing.

- Examples include updating loose-leafs and updating Web sites.

Iteration

- An instance of an integrating resource, either as first published or after it has been updated.

Three Major Types of IR

- **Updating Database**
  - A database is a collection of logically interrelated data stored together in one or more computerized files, usually created and managed by a database management system.

- **Updating Web Site**
  - A Web site that is updated, but does not fit into one of the other MARC 21 Type of Continuing Resource categories.

- **Updating Loose-leaf**
  - Consist of base volume(s) updated by separate pages: inserted, removed, and/or substituted.

Definitions from: *MARC 21 Format for Bibliographic Data*, 008 – Continuing Resources p. 8 (character position 21: Type of Continuing Resource).

Updating Database

Updating Web Site

Continuing and Finite IR

- **Continuing** integrating resource:
    - Issued over time in a series of iterations with no predetermined conclusion.
    - Most integrating resources are continuing.

- **Finite** integrating resource:
    - Issued over time with a predetermined conclusion; intended to be completed in a finite number of iterations. Single event Web sites are common finite integrating resources.

Finite Updating Web Site

2001
A Library Odyssey

Wisconsin Association of Academic Librarians
Annual Conference

April 18 - 20, 200
La Crosse, Wisconsi

Conference Home

Highlights

Schedule

Registration

Contacts

Co-Sponsors

Vendors

WAAL Home

Post-conference Resources

More coming soon!

- **Electronic Books: Challenges and Rewards.**
  Conference Presentation by Lynn Silipigni Connaway
  Conference Presentation by Susan Barribeau.
  Conference Presentation by Steve Miller

- **Universal Borrowing**
  Conference Presentation by Michele Strange and Stephen Elfstrand

- **Table of Contents MARC Enrichment: Beyond Should We or Shouldn't We?**
  Conference presentation by William Doering
  Companion website by Denise Babin

Conference Home | Highlights | Schedule | Registration | Contacts | Co-Sponsors | Vendors | WAAL Home

Last updated: January 12, 2001
Stefan Smith

Databases on CD-ROM are not Integrating Resources

- According to LCRI 1.0, **only remote-access updating databases are integrating resources**.

- All direct-access updating databases, e.g., those on CD-ROM, should be treated as serials, because the carrier is issued successively.

- *Extract from LCRI 1.0:*
    - Catalog as serial:
        ii) 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 type of issuance as published.
    - See: LCRI 1.0: http://lcweb.loc.gov/catdir/cpso/lcri1_0.html (available as of 9/14/2007)

Brief Cataloging Highlights

Four things especially different about the new rules for integrating resources

1) AACR2 Chapters

- Use AACR2 Ch. 9 and Ch. 12 for <u>all</u> electronic integrating resources.
  - Both finite and continuing.

- <u>Also</u> use any other chapter relevant to the predominant type of resource content.

- Examples:
  - <u>For updating Web site</u>: use Chapters **9 & 12**.
  - <u>For updating online atlas</u>: use Chapters **3, 9, & 12**.

2) Integrating Entry

- **Existing bibliographic record is changed** to describe current iteration of the resource.
  - Most areas of description based on **latest iteration**.
  - Different data elements of **previous iterations** entered in notes if required or considered important.

- **New bibliographic record** is created only for certain changes in edition, mergers, splits, or when there is a new work.
  - (Changes in physical medium still under consideration.)

- Bibliographic records for integrating resources will therefore require ongoing **maintenance**.

3) MARC Variable Fields

- Some notes and other elements will be tagged in variable fields formerly used for serials:
  - **022/222** – ISSNs and key-titles.
  - **247/547** – for former title.
  - **310/321** – for frequency of updates.
  - **362 1** – for dates of publication when not from first/last iteration.
  - **550** – for issuing body information.
  - **580, 760-787** – linking notes for resource relationships
- These fields may be new to many monographs catalogers.

4) MARC Leader and 006/008

- **New Bibliographic level code for integrating resources:**
  - **Leader/07 (BLvl)** code "**i**" for Integrating resource.
  - Implemented in OCLC; may not be implemented in local integrated library systems.

- Former "interim" coding practice prior to implementation of code "i" (may still be needed in some local systems):
  - Continue to code integrating resources as Monographs: Bibliographic level "m".
  - Add Continuing Resources 006 using new values for integrating resources to all IR records.
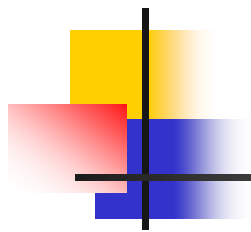
Overview of AACR2 2002 for Electronic Integrating Resources

Chapter 12 and New Scope: 12.0A

- <u>Former title</u>: "**Serials**"
- <u>New title</u>: "**Continuing Resources**"
  - Covers the description of <u>all</u> continuing resources:
    - **Successively issued resources**, i.e., **serials.**
    - **Integrating resources**, e.g., updating databases, updating Web sites.
  - Also covers selected categories of <u>finite</u> resources that exhibit certain characteristics of serials:
    - Reprints of serials.
    - Finite integrating resources.
    - Resources with characteristics of serials but whose duration is limited

Basis of the Description: 12.0B1b

Areas based on <u>current</u> iteration:

- 1. Title and statement of responsibility.
- 2. Edition.
- 3. Material-specific details.
- 4. Publication, distribution, etc.
  - [Except Dates]
- 5. Physical description.
  - [Not used for remote access e-resources]
- 6. Series.

Basis of the Description: 12.0B1b

Area based on <u>first and/or last</u> iterations:

- 4F. Dates of publication, distribution, etc.

Areas based on <u>all</u> iterations and any other source:

- 7. Note.
- 8. Standard number and terms of availability.
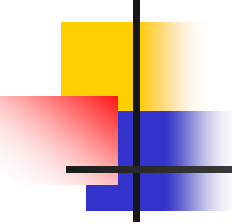
Chief Source of Information: 12.0B2

- Use Rule 9.0B for all electronic integrating resources
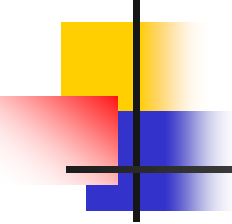
1. Title and Statement of Responsibility Area

Transcription of Title Proper: 1.1B1 and 12.1B

- 1.1B1: Do not transcribe introductory words not intended to be part of the title (such as "Welcome to"); instead give the title with these words in a note.

- 12.1B1: Correct obvious typographic errors and give title as it appears in a note.
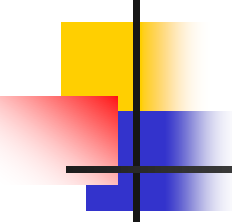
Transcription of Title Proper: 1.1B1 and 12.1B (cont.)

- 12.1B2: When title appears in full and in the form of an acronym or initialism, choose the full form (e.g., *Program for Cooperative Cataloging* instead of *PCC*).

- 12.1B4: If resource is a part of another resource and bears both the common title and its own section title, give both in that order, separated by a period. E.g.:
  - Will not apply to many electronic integrating resources.

Change in Title Proper: 12.1B8

- **If changes appear in title proper in later iteration:**

- Change the title and statement of responsibility area (245 $a/n/p) to reflect the current iteration.

- And, in most cases, give the earlier title in a note.

  - Use MARC 247 and/or 547 fields for this.

    - See section on notes ahead (12.7B42) for examples.

  - LCRI: Identify which iteration prior to the current had this form of the title proper.

- [See also rules 21.2C1 and 21.30J.]

Parallel Title and Other Title Information: 12.1D-E

- Transcription of other title information:
  - Transcribe other title information only if considered to be important; do not transcribe if it consists only of words relating to the currency of the contents (12.1E).
- Changes to parallel title and/or other title info.:
  - Change the title and statement of responsibility area (245 $b) to reflect the current iteration.
    - Applies to other title info. only if recorded in Area 1.
  - Make a note of the earlier form only if considered important.

Statements of Responsibility: 12.1F

- Transcription:
  - Record statements relating to editors in this area only if considered to be important (12.1F3b).

- Changes:
  - If a statement of responsibility is added, deleted, or changed in a later iteration:
    - Change the title and statement of responsibility area to reflect the current iteration.
    - Make a note if the change is considered to be important.
    - [Note: such changes may also entail a change in choice of main entry; see slides ahead for examples.]

2. Edition Area

Transcription of Edition Statement: 12.2B

- Transcribe an edition statement if considered to be important.

- Statements indicating regular revision or frequent updating:
  - Give as frequency information in the note area rather than as an edition statement (12.2B2; 12.7B1).
  - [Note: Rule 9.2B8 to this effect is deleted in 2002 Amendments and is now covered here.]

Change in Edition Information: 12.2F1b

- If edition information is added, deleted, or changed in a later iteration, and this change **does not require a new description**:
  - Change the edition area to reflect the current iteration.
  - Make a note if the change is considered to be important.
- **Certain changes do require a new record:**
  - When there is a change in edition information and the resource is considered to be a new work: see next slide →

Change in Edition Information: **LCRI** 12.2F1

- Make a new description/record:
  - For updating remote access e-resources: only if the resource described in the existing record continues to exist as a resource separate from new resource to be cataloged.

3. Material-Specific Details Area

12.3 – Numbering Area

Numbering Area: 12.3

- This area is not generally applicable to integrating resources.

- LCRI: This area does not apply to integrating resources even if updates are numbered.

  - Note: MARC field 362 is used for Areas 3 & 4 for serials, but can also be used for Area 4 for IRs. *See: Dates of Publication: MARC Tag 362*

4. Publication, Distribution, Etc. Area

Change in Place or Name of Publisher: 12.4C2 ; 12.4D2

- If the place and/or name of the publisher, distributor, etc. changes in a later iteration:
  - Change the publication, distribution, etc., area to reflect the current iteration
  - Give the earlier place and/or name in a note if considered important.

Dates of Publication: 1.4F8 ; 12.4F

- <u>Main Rule</u>:
  - If viewing the first and/or last iteration, give the beginning and/or ending dates in area 4 (260 $c).
  - If not viewing the first/last iteration or not certain, do not give the dates in this area; instead, give date information in a note if it can be readily ascertained.
- <u>Optional Rule</u>:
  - Supply bracketed dates in this area if they can be readily ascertained.
- <u>LCRI 1.4F8</u>:
  - Apply this option on a case-by-case basis when the resource includes an explicit statement [i.e, about the date of creation or first publication online].

Dates of Publication Note: 12.7B11 and MARC Tag 362

- Usage:
  - 362 with first indicator 1 is an unformatted note that may be used for giving date information for some integrating resources when first/last iterations are not available.
  - Note: 362 with first indicator 0 is used only for serials numbering (Area 3). It is not used for Integrating Resources.

Dates for EIR: Examples (1)

- **A. In rare cases** where you **know** you are viewing **the first iteration** of an updating Web site or updating database:
  - Resource has explicit statement about beginning date:
    - 260   New York : $b Corona, $c 1997-
  - Resource does not have explicit statement about beginning date:
    - 260   New York : $b Corona, $c [199-?]-

- **B. In most cases** you will **not** be viewing **the first iteration**, or in some cases you may not know for certain:
  - Web site has explicit statement about beginning date:
    - 260   New York : $b Corona, $c [1997]-

← Date given in brackets because not from first iteration

Note: all examples show what to do if following LCRI 1.4F8

Dates for Electronic IR: Examples

- B. Cases where you are not viewing first iteration, continued:
    - Web site does <u>not</u> have explicit statement about beginning date; and has no date information or copyright date for current year only:
        - 260   New York : $b Corona   ← No date; no ending punctuation
        - 362 1 Began in late 1990s.   ← Date information given in note (two possibilities shown)
        - 362 1 Probably began after 2001.
    - Web site does <u>not</u> have explicit statement, but has range of copyright dates that apply to entire resource being cataloged, e.g.: © 1997-2003:
        - 260   New York : $b Corona   ← No date; no ending punctuation
        - 362 1 Began in 1997?   ← Date information given in note

5. Physical Description Area

- Not required for <u>remote access</u> <u>electronic</u> IR
  - Updating Web sites & databases
  - But AACR2 allows it as an option (see 9.5 examples)
- Always used for <u>printed</u> IR
  - Updating loose-leafs

6. Series Area

Change in Series Statement: 12.6B2

- **If a series is added, deleted, or changed in a later iteration:**
  - Change the series area to reflect the current iteration.
    - MARC 4XX and/or 8XX.
  - Make a note if the change is considered important (see 12.7B14.2).
    - Retain former series entries in 8XX if traced in local library, justified by 500 note explaining the change in series.

7. Note Area

General Rules for Notes for IR

- Include all notes prescribed by the relevant AACR2 chapter for the content being cataloged, and any other notes considered important.

- Also include notes for changes to all areas of description as prescribed in Chapter 12 or as considered important.

- If it is known that a note does not apply to all iterations of an integrating resource, add appropriate numbering or publication dates.

MARC Tagging of Notes

- Most notes tagged in MARC **5XX** range.
- The following MARC fields were formerly used primarily or exclusively for serials. Now, they are also used for integrating resources:
  - **247** for former title proper.
  - **310** for frequency of updates.
  - **321** for past frequencies of updates.
  - **362 1** for publication date information when not from first/last iteration.
  - **550** for issuing body notes, such as former issuing body.
  - **580, 760-787** for links to records for related resources

Identification of Iterations in Notes: LCRI 12.7A2

- When a data element changes (LC/PCC Practice):
  - Give exact information about the timing of the change if that information is readily available
  - If exact information is not readily available, use information already in the record to locate in time the presence of the earlier data element.
    - Give that information in angle brackets.
    - For electronic IRs: use the date from the "viewed on" information.
    - For non-electronic IRs: use information from a "Description based on" note.

Frequency Note: 12.7B1

- Note the frequency of updates to an integrating resource.
  - Unless:
    - Frequency is apparent from content of the title and statement of responsibility area
    - Frequency of updates is unknown.
  - LC/PCC Practice:
    - Always give a note for known frequency of updates, even if already apparent from the rest of the description [LCRI 12.7B1].
- Always include the word "updated" or "updates" with the frequency to clarify that the resource itself does not have a frequency (LCRI 12.7B1).

Frequency Note: MARC Tagging

- State <u>current frequency</u> in 310 frequency note.

  - Example 1:   310   Updated quarterly
  - Example 2:   310   Continually updated

- State <u>former frequencies</u> in 321 former frequency note.

  - Example:

    - 310   Updated quarterly, $b 2002-
    - 321   Updated monthly, $b 1998-2001

Notes for Changes in Description

- Make notes on information no longer present in current iteration, or that appeared in a different form in previous iterations, if considered to be important.

- If the changes have been numerous, make a general statement.

- Rules given for each area, for example:
  - 12.7B5.2b: Change in parallel title.
  - 12.7B6.2b: Change in other title information.
  - 12.7B7.2b: Change in statements of responsibility.
  - 12.7B9.2b: Change in edition information.
  - 12.7B11.2b: Change in place of publication or publisher.
  - 12.7B12.2b: Change in physical details.

Change in Title Proper Note: 12.7B4.2

- Make notes on earlier titles proper.
- MARC tagging:
  - 247: Former title proper.
    - Use to generate title added entry in addition to note.
    - Use for title proper only.
  - 547: Former title proper complexity note.
    - Use for more complex situations and/or when a title added entry is not needed.
    - LCRI: Give a separate 547 "Title history" note in addition to the 247 field only if the situation requires more explanation than can be given in the 247 field. Do not give a 547 field just because there are multiple 247 fields.

Example: Change in Title Proper (Web site)

Existing record:
- 245 00 $a Early music resources on the Web $h [electronic resource].
- 500 ## $a Title from HTML header (viewed Jan. 5, 1999)

Same record updated:
- 245 00 $a Resources for early music $h [electronic resource].
- 247 10 $a Early music resources on the Web $f <Jan. 5, 1999>
- 500 ## $a Title from HTML header (viewed Apr. 15, 2001)

Same record updated again:
- 245 00 $a Resources for early music scholars $h [electronic resource].
- 247 10 $a Early music resources on the Web $f <Jan. 5, 1999>
- 247 10 $a Resources for early music $f <Apr. 15, 2001>
- 500 ## $a Title from HTML header (viewed July 7, 2002)

Example: Change in Frequency of Updates (Database)

Existing record:

- 245 00 $a Database of prescription drugs $h [electronic resource].
- 260 ## $a San Francisco : $b Medical College
- 310 ## $a Updated weekly
- 362 1# $a Began in 1999.
- 500 ## $a Title from title screen (viewed Feb. 5, 1999).

Same record updated:

- 245 00 $a Database of prescription drugs $h [electronic resource].
- 310 ## $a Continually updated, $b <2001->
- 321 ## $a Updated weekly, $b 1999-<2001>
- 362 1# $a Began in 1999.
- 500 ## $a Title from title screen (viewed May 28, 2001).

Bibliographic History and Relationships Note: 12.7B8

- Note the bibliographic history and important relationships between resource being described and other related resources, such as:
  - Continuations
  - Mergers
  - Splits
  - Absorptions
  - Translations
  - Supplements
  - Simultaneous editions

Reciprocal Linking Notes

- Link records in a database for integrating resources with relationships serials, monographs, and other integrating resources.

- Use MARC linking entry fields 76X-78X.

  - Links consist of catalog entry ($a, $t, etc.), ISSN ($x) or ISBN ($z), and record control numbers ($w).

- Also use 530 and 580 notes, or $i in linking field, if needed for explanation.

Link example: print serial continued by online updating database

- 245 00 Performance practice encyclopedia $h [electronic resource].

- 538   Mode of access: World Wide Web.

- **580   A continuation of the print journal: Performance practice review.**

- **780 10 $t** Performance practice review $x 1044-1638 **$w** (DLC)   89645461 **$w** (OCoLC)18712767

Item Described Note: 12.7B23

- If the description is not based on the first iteration, make a note of the latest iteration consulted in making the description:

    - 500   Description based on: update no. 3, Sept. 2001.

- For remote-access resources, <u>always</u> give date on which resource was viewed for description.

- Often combined with source of title proper note:

    - Example for printed loose-leaf:

        - 500   Description based on: update no. 4; title from cover.

    - Example for remote access electronic resource:

        - 500   Title from HTML header (viewed on Feb. 15, 2002).

8. Standard Number [etc.] Area

- Standard Number: 12.8B1
  - ISBN: 020
  - ISSN: 022
    - LCRI: If an integrating resource has both, give both in the catalog record.
  - Change in ISBN:
    - Add new ISBN.
      - Example: when a loose-leaf becomes multi-volume and each volume has a separate ISBN.

Access Points

Main and Added Entries

Changes in name and uniform title entries.

- Make changes to reflect latest iteration.

- Retain entries for past iterations.

  - If considered important for access.

- Choice of main entry could change.

  - Apply Chapter 21 to current iteration.

Change in Main Entry

- Change **1XX** entry for person or body currently responsible for the resource.

- Make note for earlier responsible person in **500** or body in **550** note, if considered important.
  - Required to justify 7XX entry if present (in full level records).
  - Include dates to identify iteration.

- Add name for earlier person or body in **7XX** if considered important for access.
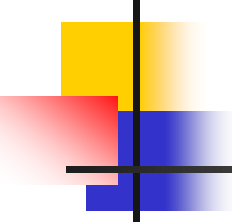
Example: Change in Responsible Body (online updating database)

Existing record:
- 110 2# $a ABC Association.
- 245 10 $a Membership directory $h [electronic resource] / $c ABC Association.
- 500 ## $a Title from home page (viewed on Aug. 1, 1998).

Same record updated:
- 110 2# $a DEF Association.
- 245 10 $a Membership directory $h [electronic resource] / $c DEF Association.
- 500 ## $a Title from home page (viewed on Dec. 15, 2002).
- 550 ## $a Issued by ABC Association <Aug. 1, 1998>
- 710 2# $a ABC Association.

Example: Second Change in Responsible Body (updating database)

Same record updated again:

- 110 2# $a GHI Association.
- 245 10 $a Membership directory $h [electronic resource] / $c GHI Association.
- 500 ## $a Title from home page (viewed on Jan. 10, 2003).
- 550 ## $a Issued by ABC Association <Aug. 1, 1998>; DEF Association <Dec. 15, 2002>
- 710 2# $a ABC Association.
- 710 2# $a DEF Association.

Beyond AACR2:
Subject Headings

- Original headings should be broad enough to encompass changing subject content.

- If significant additions, deletions, or other changes in subject content considered important:

  - Add new subject headings for current iteration and/or delete headings for past iterations no longer applicable to the resource.

MARC Leader and 006/008

MARC Leader and 006/008

- Most new IR codes implemented by OCLC and RLG December 1, 2002.

- Bibliographic Level Leader/07 code "i" implemented by OCLC in July 2006.

- <u>For further implementation information see</u>:
  - *Interim practice:* OCLC *Technical Bulletin* 247, Section 1 "Coding Practice for Integrating Resources": http://www.oclc.org/technicalbulletins/247/#1
  - *Current Practice:* OCLC Technical Bulletin 252, Section 1 "New Coding Practice for Integrating Resources": http://www.oclc.org/support/documentation/worldcat/tb/252/#newcoding

Leader: Type of Record

Used to differentiate MARC records created for various types of content and material.

- **Definitions revised** to <u>include electronic carriers of primary content</u> in addition to print, etc.
- Examples:
  - **a - Language material**:
    - "Code a is also used for ... electronic resources that are basically textual in nature ..."
  - **e - Cartographic material**:
    - Includes digital maps.
  - **g - Projected medium**:
    - Includes digital video.

Leader: Bibliographic Level

- Previously existing codes:
  - a - Monographic component part
  - b - Serial component part
  - c - Collection
  - d - Subunit
  - **m - Monograph/item**
  - **s – Serial**
- New code added:
  - **i - Integrating resource**

Leader and 008 for Integrating Resources

- Most electronic integrating resources have predominantly textual content.
  - Including most databases and Web sites.
- Most will therefore use the MARC **Leader and 008** for **continuing resources**:
  - **Type of Record** code "**a**" – Language material.
  - **Bibliographic Level** code "**i**" – Integrating resource.
  - Will result in **Continuing resources 008**, but with some values for integrating resources.
- **All** integrating resources now use code "i," regardless of Type of Record code

New 006/008 Elements

Additions and changes to Continuing resources (formerly Serials) 006/008 for IR:

- Frequency [006/01]
    - (Includes new code "k")

- Type of Continuing Resource [006/04]
    - Formerly named: Type of Serial

- Entry Convention [006/17]
    - Formerly named: Successive/Latest Entry
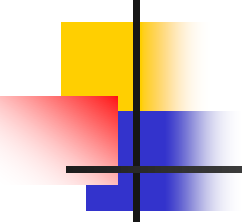
Frequency and Regularity

Frequency codes, *selections*:

- **blank** - No determinable frequency (irregular)
- **d** - Daily
- **k** - Continuously updated
  - (New code added in 2002)
- **m** - Monthly
- **q** - Quarterly
- **u** - Unknown
- **w** - Weekly

Regularity codes:

- **r** - Regular
- **n** - Normalized irregular
- **x** - Completely irregular
- **u** - Unknown
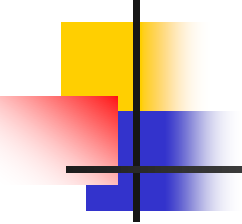
Frequency and regularity examples (1)

- 1. Frequency of updates is known and regular:
  - 310   Updated quarterly
    006   Freq: q   Regl: r

- 2. Frequency of updates is known and "normalized irregular":
  - 310   Updated monthly (except July-Sept.)
  - 006   Freq: m   Regl: n

- 3. Frequency of updates is unknown:
  - [No 310]
  - 006   Freq: u   Regl: u

Frequency and regularity examples (2)

- 4. Frequency of updates is known to be extremely frequent:
    - (e.g., usually or always more frequently than daily)
  - 310   Continuously updated
  - 006   Freq: k   Regl: r

- 5. Frequency of is known to be completely irregular:
    - (e.g., OLAC web site)
  - 310   Updated irregularly
  - 006   Freq: _   Regl: x

Type of Continuing Resource
(formerly called Type of Serial)

- Previously-existing codes include:
    - **m** - Monographic series
    - **n** - Newspaper
    - **p** - Periodical
- New codes added:
    - **d** - Updating database
    - **l** - Updating loose-leaf
    - **w** - Updating Web site

Entry Convention
(formerly called Successive/Latest Entry)

- Serials values:
  - **0 - Successive entry**
  - **1 - Latest entry**
- New value added for Integrating resources:
  - **2 – Integrating entry**
    - **Record is cataloged under its latest (most recent) title and/or responsible person or body.**
    - A new record is made only when there is a major change in edition or it is determined that there is a new work, and for title mergers and splits.

Other 006/008 Elements
for continuing resources

- ISSN center
- Form of original item
- Form of item
- Nature of entire work
- Nature of contents

- Government publication
- Conference publication
- Original alphabet or script of title

Additional Examples

Record Before and After 2002 Amendments (Updating Web site)
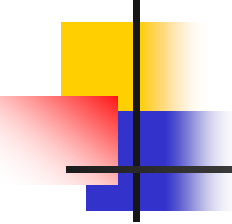
Description if created <u>before</u> 2002 Amendments:

- 245 00 Comparative religions web $h [electronic resource].
- 260 ## $a Berkeley, Calif. : $b RELCOM, $c [199-]-
- 500 ## $a Title from title screen (viewed Oct. 1, 2001).

Description if created <u>after</u> 2002 Amendments:

- 245 00 Comparative religions web $h [electronic resource].
- 260 ## $a Berkeley, Calif. : $b RELCOM
- 310 ## $a Updated irregularly
- 362 1# $a Began in 1990s.
- 500 ## $a Title from home page (viewed Oct. 1, 2002).

008 for Continuing Resources:

Type: a	ELvl: I	Srce: d	GPub: f	Ctrl:	Lang: eng
BLvl: i	Form: s	Conf: 0	Freq: _	MRec:	Ctry: dcu
S/L: 2	Orig: s	EntW:	Regl: x	ISSN: 0	Alph: a
Desc: a	SrTp: w	Cont:	DtSt: c	Dates: 199u,9999	

Leader and 008: <u>Interim vs. Current OCLC Practice</u>

`245 00` **`Global invasive species database`** `$h [electronic resource].`

Record after Dec. 2002 but before implementation of Leader/07 code "i":

- `Leader/06 (Type of Record)` → `a - Language material`
- `Leader/07 (Bibliographic Level)` → `m - Monograph`
- `008 (Fixed length data elements)` → `Books`
- `008/06 (Type of Date)` → `m - Multiple dates`

Record after implementation of Leader/07 code "i" (July 2006 in OCLC):

- `Leader/06 (Type of Record)` → `a - Language material`
- `Leader/07 (Bibliographic Level)` → `i - Integrating resource`
- `008 (Fixed length data elements` → `Continuing resource`
- `008/06 (Publication status)` → `c - Currently published`
- `008/21 (Type of cont. resource)` → `d - Updating database`
- `008/34 (Entry convention)` → `2 - Integrating entry`

Addendum:
Updating Loose-leafs

The following slides cover only what is distinctive for integrating loose-leafs, i.e., what is different from electronic integrating resources as covered in the previous slides

Definitions

- **Updating loose-leaf**
    - An integrating resource that consists of one or more base volumes updated by separate pages that are inserted, removed, and/or substituted.

Chief source of information: 12.0B2

For a printed integrating resource:

- The title page or title page substitute.

Example: Change in Title Proper (Loose-leaf)

Existing record:

- 245 00 $a Health profession opportunities.
- 500 ## $a Description based on: update 5, published 2000.

Same record updated:

- 245 00 $a Healthcare profession opportunities
- 247 10 $a Health profession opportunities $f update 5, published 2000
- 500 ## $a Description based on: update 6, published 2000.

Same record updated again:

- 245 00 $a Opportunities in the healthcare profession.
- 247 10 $a Health profession opportunities $f update 5, published 2000
- 247 10 $a Healthcare profession opportunities $f update 6, published 2000
- 500 ## $a Description based on: update 7, published 2001.

Change in Edition Information (Loose-Leafs)

LCRI 12.79B9.2: Updating Loose-Leafs

- For a gradual replacement edition, make a note about the new edition statement.

  Example:
  - 250 $a 2nd ed.
  - 500 $a Updated to 2nd ed., June 2001.

Physical Description: 12.5B

Extent of item for loose-leafs:

- Add the qualifier *(loose-leaf)*.
- <u>For ongoing loose-leaf</u>:
  - No number of volumes given:
    - **300 $a v. (loose-leaf)**
- <u>For completed loose-leaf</u>:
  - Number of volumes added:
    - **300 $a 3 v. (loose-leaf)**

Physical Description: LCRI 12.5B1

- Before Dec. 1, 2002, the number of volumes was included for updating loose-leafs that were still in progress. LC/PCC practice: Do not update those records.

- If the updating loose-leaf includes transfer volumes, describe the extent in terms of "loose-leaf" and "transfer."
  - **300 $a v. (loose-leaf), v. (transfer)**

Physical Description: LCRI 12.5B2

- If a completed updating loose-leaf consisted of both numbered and unnumbered volumes, record in the extent statement the total number of volumes.

- If it is important to indicate the presence of unnumbered volumes, make a note (see rule 12.7B12).

- Prior to Dec. 1, 2002, only the numbered volumes were recorded in the extent statement.

Physical Description: 12.5C2

Change in Other Physical Details:

- Change 300 $b to reflect the current iteration and make a note if the change is considered to be important.

  - **300 $a v. (loose-leaf) : $b col. ill. ; $c 28 cm.**

    (Formerly, illustrations were black & white.)

Physical Description: 12.5D2

<u>Change in dimensions</u>:

- Change 300 $c to reflect current iteration.
  - LCRI 12.5D2: If there is more than one unit in the current iteration and those units differ in size, record the range of dimensions:
    - 300 　$a v. (loose-leaf) ; **$c 24-26 cm.**

Example: Change in Series Statement (Loose-leaf)

Existing record:

- 260 ## $a Denver : $b Smith Pub. Co.
- 440 #0 $a Research in library acquisitions
- 500 ## $a Description based on: update 2, published in 1991.

Same record updated:

- 260 ## $a Denver : $b Smith Pub. Co.
- 490 1# $a Library acquisitions
- 500 ## $a Series title <1991-   >: Research in library acquisitions.
- 500 ## $a Description based on: update 9, published in 2000.
- 830 #0 $a Research in library acquisitions.
- 830 #0 $a Library acquisitions (Denver, Colo.)

Example: Change in Frequency of Updates (Loose-leaf)

Existing record:

- 260 ## $a New York : $b Corona, $c 1997-
- 310 ## $a Updated quarterly

Same record updated:

- 260 ## $a New York : $b Corona, $c 1997-
- 310 ## $a Updated monthly, $b July 2001-
- 321 ## $a Updated quarterly, $b Jan. 1997-June 2001
- 500 ## $a Description based on: update 19, published in July 2001.

Concluding Review

Review: Definitions

- <u>Integrating resources</u>:
  - Added to or changed by means of updates that do not remain discrete and are integrated into the whole.
  - Include updating loose-leafs, updating databases, and updating Web sites.
  - Most are continuing; some are finite.

Review: Bib. Description

- <u>Description is based on latest iteration</u>:
    - Called "Integrating entry" in MARC 21.
    - Bibliographic record reflects changes in resource:
        - Change description to reflect current iteration.
        - Give earlier information in a note.
            - For title proper: "generally."
            - For other elements: if considered important.
        - Exception: certain changes to edition area require new bibliographic record.
            - e.g., when Web site changes so as to become an entirely "new work".

Review: MARC Coding

- **Current MARC coding:**
  - *All* IRs have Bibliographic Level code "i".
  - *Most* have Type of Record "a" and Continuing Resources 008 .
  - *Some* have have other Type of Record codes and 008s.
    - Should also then add Continuing Resources 006 to code for integrating aspects.

- Former/interim MARC coding (for systems which have not yet implemented Bibliographic Level "i"):
  - Code IR as monographs: Bibliographic level "m".
  - Add Continuing Resources 006 with integrating resources codes.

A Presentation by the OLAC CAPC Integrating Resources Task Force

- This online training presentation is the result of the collaborative work of the members of the Task Force:
    - Steven Miller, Chair, University of Wisconsin—Milwaukee
    - Kay Johnson, University of Tennessee
    - David Reynolds, Johns Hopkins University

- This presentation had its origins in a training workshop developed for the Program for Cooperative Cataloging (PCC), April-Sept., 2002.
- The content creators are also in various ways indebted to following people for their review and comments (April, 2002 – Jan., 2003):
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    - Adam Schiff, Rhonda Lawrence, Louise Rees, Ann Sitkin, Paul Weiss (PCC)
    - Members of OLAC's Cataloging Policy Committee

The content was reviewed and updated in September, 2007 by Steven Miller

Comments and Feedback

- Please send comments or questions about this online training presentation to:

  - Chair, OLAC Cataloging Policy Committee (CAPC); see roster of current OLAC officers: http://ublib.buffalo.edu/libraries/units/cts/olac/board.html