[Agenda](http://www.loc.gov/aba/pcc/documents/Agenda-OpCo-2014.doc) (Word 62KB) with attached documents

**Thursday May 8, 2014 Joint Meeting Outcomes**

1. Series topics

The RDA Series Training Task Group, under the Standing Committee on Training, named a subgroup to identify areas where PCC series policies were needed (either new policies or changes to existing AACR2 policies) in the RDA environment. The subgroup consists of four persons. The subgroup has gone through existing documentation and made recommendations. The recommendations made so far (the group is still completing its work) have been forwarded to the Standing Committee on Standards to review and to codify as PCC policies.

The RDA Series Training Task Group is finalizing training materials for RDA NACO series work and should have a completed product ready in time for the ALA meeting in Las Vegas. A face to face training session is being discussed. It will be hosted by Columbia University.

1. Overview of [Guidelines on Using Relationship Designators in NACO Authority Records](http://www.loc.gov/aba/pcc/rda/PCC%20RDA%20guidelines/Relat-Desig-Guidelines-AUTH-Final.docx) (Word 178, KB)

The latest version of the relationship designator guidelines for authority records was reviewed. Highlights include the instruction to use subfield $i with subfield $w "r" when giving relationships in 5XX fields of authority records.

1. Relationship designators for bibliographic records SCT training sheets

The training sheets contain examples and instructions that expand on the basic guidelines given in the [Guidelines on Using Relationship Designators in Bibliographic Records](http://www.loc.gov/aba/pcc/rda/PCC%20RDA%20guidelines/Relat-Desig-Guidelines.docx) (Word: 24 KB). The training sheets also include a section on capitalization and punctuation, since guidance on those two topics is spread out all over PCC documentation and is often hard to find.

1. Phase 3 conversion of the LC/NACO Authority File

Timeline and possible projects that will be a part of the final phase of the RDA re-coding of the LC/NACO Authority File: PCC help with reviewing the automated changes will be sought. NACO members may participate in the review. A call for volunteers will be sent out over the next few months. Phase Three, unlike Phases One and Two, will be a long-term project, perhaps taking over one year to complete.

1. 008/29 “b” and 667 in authority records with non-Latin references

Attendees discussed a draft survey developed to gauge the impact of replacing code 008/29 “b” with a new default code and removing 667 non-Latin references not evaluated notes. If survey results indicate that these changes will not have a large impact on most users, the work could be rolled into the Phase 3 conversion.

1. RDA Microform Reproductions Cataloging Task Group Report

**Outcome:** The Standing Committee on Standards (SCS) will recommend that PoCo accept the procedures listed on pages 2-3 of the: [SCS Response to the Task Group Report](http://www.loc.gov/aba/pcc/documents/Micro-TG-SCS-Response.docx) (Word, 37 KB). According to these procedures for describing a microform reproduction, publishing information pertaining to the original is contained in the 264 field and dates from the original are recorded in the 008 fixed fields. Details of the reproduction will be recorded in the 533 note. Original records following these procedures may be coded RDA and 042 ## $a pcc. The SCS recommendations only apply to microform; facsimile print reproductions will continue to follow RDA.

**Action:** The SCS will forward its recommendations to the PoCo for approval.

**Suggested action:** Recommend making treatment of microform serials under the proposed guidelines a test case for test case for BIBFRAME

1. Integrating Resources revised Module 35/Appendix A Discussion
   1. See [separately issued outcomes document](http://www.loc.gov/aba/pcc/documents/Outcome-IR-Discussion.docx) (Word; 28 KB) submitted to the Module 35 editorial group after the meeting.
2. ISBD Punctuation and MARC. Three proposals for pursuing clean-up of ISBD punctuation before moving to BIBFRAME were discussed (see pages 3-4 of the [discussion document for this topic](http://www.loc.gov/aba/pcc/documents/bremer-ISBD.pdf))

**Outcome:** Beth Picknally Camden will ask PoCo to consider the three proposals made in the presentation. The OpCo discussion was mostly favorable to the concept of eliminating ISBD punctuation to ease the conversion of MARC 21 records to BIBFRAME format and other non-MARC formats. There were concerns about timing of large scale removal of ISBD punctuation from records, notification of vendors and other users of records, as well as the potential impact on local systems.

1. [FAST](http://www.loc.gov/aba/pcc/documents/OpCo2014FAST.pptx) (Faceted Application of Subject Terminology)

**Question #1:** Is a record with FAST headings alone (lacking LCSH or MeSH) eligible to be authenticated as 042 ## $a pcc?

**Discussion:** BIBCO section 5.5 has no requirement for a specific thesaurus. Some BIBCO participants want to just use FAST, rather than LCSH or MESH

**Agreement:** Yes, a record containing only FAST subjects can be coded as a PCC record.

**Question #2:** More generally, can PCC members use ANY authorized scheme included in the Subject Heading and Term Source Codes or Genre/Form Code and Term Source Codes to create pcc records?

**Discussion:** Even though PCC records represent English as the language of cataloging, may the sole subject headings on a PCC record be from a vocabulary in another language, e.g., RVM (Répertoire de vedettes-matière)? This was allowable under AACR2.

**Agreement:** Yes, according to BIBCO manual, Section E5.5.

**Question #3:** What about thesauri not included in the list of Subject Heading and Term Source Codes or Genre/Form Code and Term Source Codes? Would there be a way to code the term as being from a specific vocabulary?

**Suggestion:** All PCC records must use an authorized thesaurus included in the list which is recognized by MARC21 Format. A record could use $0; if registered with a URI, then a link can be made to the thesaurus even if it is not in MARC, in which case the record should not be coded 042 ## $a pcc.

**Question #4:** What are the training needs?

**Suggestion:** Cornell University is developing training documentation for FAST and welcomes inquiries from those who are interested in knowing more of it.

**Outcome:** Most PCC libraries use LC, LCSH, and MESH. Therefore the PCC does not have much experience or documentation to guide members who wish to use alternative subject schemes exclusively or in addition to LC, LCSH, and MESH. The PCC Secretariat will document the practice for applying FAST as an example in the BIBCO Participants’ Manual. The Secretariat will monitor the questions from members and assess if training support will be needed on applying FAST.

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**Friday, May 9, 2014, BIBCO Meeting Outcomes**

1. [PCC End date for AACR2](http://www.loc.gov/aba/pcc/documents/Final-date-AACR2-PCC-Bib.html)

**Discussion:** All participants in the audience are already using RDA for their BIBCO contributions except for Tulane, which fully expects to do so before the end of the year.

Members raised questions about some of the information presented on the [PCC End date for AACR2](http://www.loc.gov/aba/pcc/documents/Final-date-AACR2-PCC-Bib.html) announcement page. With PoCo Chair Beth Picknally Camden’s acknowledgement at the meeting, it was decided that the BIBCO Section of the [PCC End date for AACR2](http://www.loc.gov/aba/pcc/documents/Final-date-AACR2-PCC-Bib.html) page will be updated to address editing of existing non-RDA records already coded PCC, and to revise the Question # 2 for greater clarity. Question #3 may also need to be revised to reflect an exception if PoCo approves the new policy on microforms being proposed by SCS.

**Outcome:** Becky Culbertson and Jessalyn Zoom will coordinate with Les Hawkins to follow up with PoCo for the proposed update.

1. [Copy cataloging](http://www.loc.gov/aba/pcc/documents/Copy-Cataloging-in-BIBCO-Member-Libraries.docx) after January 1, 2015

**Q1:** There were responses to the informal poll on whether copy always gets routed to BIBCO catalogers for authentication. Some institutions said yes, some said no. Often it depends on the encoding level of the record, with minimal-level records more likely to get routed to a BIBCO cataloger.

**Q2**: There were mixed responses to an informal poll on whether BIBCO catalogers revise copy before authenticating to match the LC-PCC PS if the copy reflects valid RDA options but not the options in the LC-PCC PS. An example of this is whether all names in a statement of responsibility should be transcribed vs. some omitted and replaced with the phrase such as “[and six others]”. Some said it depended on how the PS was worded (e.g. the word “Generally” in a PS indicates wiggle room so need to edit). Some said it depended on local policies, especially for special collections materials. In answer to the question of whether some institutions use support staff to do BIBCO authentication, most institutions said no but at least one said yes.

**Q3:** On the question of how e-book cataloging is handled, often records are received from vendors for batch loading rather than edited individually. Often batch editing is done using programs such as MarcEdit. Some vendors are BIBCO/NACO participants, but it would be worth pursuing bringing more vendors on board, especially given that many vendors prohibit uploading the records to bibliographic utilities. That way record quality would improve and we would not all have to make the batch edits locally. Also, libraries using Worldcat Local no longer make local edits so we need to encourage scenarios in which the master records are changed.

Government publications are increasingly issued as e-books and some libraries are making provider-neutral records for these (PDF and e-book on same record).

**Q4** and **Q5** were not addressed.

The issue was raised that OCLC still needs to work on matching and accept a PCC full level record over an LC record that is not full or not PCC.

1. Records for print resources and 007 for related online versions ([Abstract](http://www.loc.gov/aba/pcc/documents/007-Abstract.doc))

**Discussion:** Becky Culbertson, Chair of the SCS asked if BIBCO members would like to implement an explicit policy that allows for inclusion of 856 field but not 007 when using the single-record approach. Many libraries have stopped using the single-record approach because the records don’t work properly in faceted systems. A straw vote among participants revealed agreement that 007 should not be added to master record.

**Outcome:** Becky will take the recommendation to not add 007 for online related resources to print records to PoCo. OCLC will strip the data programmatically from existing records.

1. [PCC RDA BSR](http://www.loc.gov/aba/pcc/scs/documents/PCC-RDA-BSR.pdf) update

2014 update highlights: inclusion of information relating to use of DCRM(G) and DCRM(M) when cataloging rare graphic and rare music materials; section on archival control now applies to collections of materials in all formats; reorganized notes column and made it clearer which category of material the notes applied to; corrected typos and cut/paste errors; updated rule numbers to reflect changes in RDA Toolkit.

1. Maintaining BSR document

**Discussion:** A straw poll showed that participants preferred using a summary document to indicate changes rather than tracking changes using color coding or other formatting. Information relating to DCRM(C) and DCRM (MSS) will be added as forthcoming rules for cataloging rare cartographic materials and manuscript materials are published. There was an agreement that it makes most sense that the BSR elements are arranged by RDA rule number rather than MARC fields given that it facilitates use in a non-MARC environment. Those who would like a MARC arrangement can convert the document to Excel and sort on fields.

**Outcome:** Becky and the SCS will be working with ALA to transform BSR notes into LC-PCC PS, hopefully in time for October release of RDA Toolkit.

1. [BIBCO Participants’ Manual](http://www.loc.gov/aba/pcc/bibco/documents/BPM.doc) Appendix on Annotated Record Examples

**Discussion:** The idea of providing a BIBCO Participants’ Manual appendix with annotated record examples met with mixed reactions. While some liked the idea, others pointed out potential problems with maintenance and catalog by examples. Alternative ideas presented: a) creating a mechanism for more interactive sharing of examples rather than a static appendix; b) using the “Workflow” section of the RDA Toolkit.

**Outcome:** The PCC Secretariat will continue to collect annotated BIBCO record examples for different formats. The examples will be included in the BIBCO training material so the examples can be updated easily if needed.

1. BIBCO record modifications discussion (part 2): enhancements made to BIBCO ELvl 8 records by BIBCO catalogers ([NLM Handout](http://www.loc.gov/aba/pcc/documents/ECIP_WORKFLOW_AT_THE_%20NATIONAL_LIBRARY_OF_MEDICINE.pdf))

NLM’s BIBCO ECIP experience: see Karen Detling’s NLM handout for summary of workflow. Work at the stage after publication is received: much valuable NLM data is lost because by the time their upgraded ECIP record is loaded into OCLC, the record has already been upgraded and OCLC only merges the NLM identifier, classification, and MeSH terms into the existing record.

Cornell’s BIBCO ECIP experience: its post-receipt ECIP workflow is not much different from normal cataloging with copy. In most cases, some other library has already upgraded the ECIP data based on a copy in hand. Cornell has participated in ECIP since the beginning of the program. The scale is much smaller than NLM’s. Most of the titles Cornell catalogs are titles they have reason to work on anyway. About 75% of the titles Cornell catalogs for ECIP are titles they end up collecting. The fact that edits in the local system often don’t make it to OCLC is a general issue not restricted to ECIP records. Many BIBCO libraries probably struggle with the same issue of working with the OCLC batch loading process vs. editing directly in Connexion.

Karl Debus-Lopez (chief at LC and head of the ECIP program) provided a summary of requirements for ECIP participation which include BIBCO and NACO membership. LC is looking to expand the program and accept new partners. One of the advantages for participants is they are able to see the most current research by particular publishers or in particular subjects, languages, or geographic areas.

1. New BIBCO members

Two new members spoke about their libraries and experiences in joining BIBCO. UC San Diego joined BIBCO and ECIP Partnership Program for UC Press publications, among other reasons. Mississippi State University joined because they wanted to contribute records for hidden special collections, among other reasons.

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**Friday May 9, 2014 CONSER Meeting Outcomes**

1. CONSER Cataloging Manual update: All of the revised modules are freely available on the CONSER website: <http://www.loc.gov/aba/pcc/conser/more-documentation.html> The modules on the website are available for use as working versions. Comments on changes and corrections may be sent to [conser@loc.gov](mailto:conser@loc.gov).

Additional modules will soon be posted as editing is completed.

1. CONSER Cataloging Manual: unresolved issues
   1. Module 3.1.4 Surrogates:

A proposed an extension to the practice of using photocopies to establish or maintain CONSER records has been added to module 3. The group discussed the revision and made suggestions for rewording the examples.

**Outcome:** Les Hawkins will revise 3.1.4 and send to Steven Riel & Valerie Bross for review.

* 1. Module 9 Editions other than translations and language editions.

The discussion focused on resources that have content or manifestation differences and (often) an edition statement that reflects different content, e.g. geographic, audience level or manifestation level such as Braille or large print. These types of editions appear not to be covered by LC-PCC PS for 6.27.3 for identifying expressions by adding expression attributes to the authorized access point of the work. It is not always clear whether the differences represent work, expression or manifestation level differences. The difference in how these are considered for FRBR purposes affect how the authorized access point is constructed and the linking entry fields used for related resources. The ISSN Network’s PRESSoo model explores some of these issues in the context of BIBFRAME.

**Outcome:** No specific recommendations were made for updating Module 9, most often the construction of the authorized access point and choice of linking fields is cataloger judgment.

* 1. Module 5.2.5.1.2 deals with changes other than title which require a new description. RDA 1.6.2.1 calls for a new description for changes in mode of issuance, media type, and carrier type when a serial changes from online to another computer carrier (or vice versa). What should the authorized access point (AAP) be and what linking entry fields should be used to express the relationships?

**Discussion:**

* Suggestion: manifestation level changes, e.g. print to online, prefer to use 776 linking entries and forego a 130 authorized access point with a qualifier, unless there is a change in the authorized access point of the work (per Module 31).
* It was recognized that for some systems discovery is impacted if the authorized access point doesn’t reflect the manifestation.
* Change in mode of issuance, treat the same as change in manifestation unless there is a change in creator or other part of authorized access point.
* For any changes where there is a change in the authorized access point, use the 780/785 relationship.

**Outcome:** Les will consult with the CCM editors for final decisions on handling these types of changes in Module 5.2.5.1.2.

1. RDA Basic Serials Cataloging Workshop: A prototype version was tested at a NASIG 2014 pre-conference in May.

**Outcome:** The final version of the workshop will be posted on the CONSER website summer 2014. CONSER will introduce SCCTP trainers to the new material with online train the trainer sessions after the material is posted.

1. OAJ Project:

Serials Solutions identified 3,300 new open access journals and these were narrowed down to about 1500 titles lacking a record in any format. The titles were distributed April 22, with a December 31, 2014 deadline for completion.

**Outcome:** This year, members of the project who lack access to the ISSN Portal are encouraged to use the new ISSN ROAD portal to verify the ISSNs for journals.

1. Copy cataloging issues: revision of [CONSER Guidelines for Working with Existing Copy](http://www.loc.gov/aba/pcc/conser/documents/WorkingWithExistingRecords.doc) (Word, 45 KB)

**Outcomes:** The document has been revised based on feedback from the discussion.

1. ISSN: OAJ Project help with ISSNs

US titles:

* Use the CONSER request form to request ISSN assignments; in case of rush need, contact rrey@loc.gov
* May add $y ISSNs; but never enter $z for US titles. Do NOT add $z because it triggers a cancellation when sent to the ISSN Network as part of the CONSER file.
* If an ISSN is in the portal but not in the bib record for a US ISSN, contact issn@loc.gov .

Non-US ISSNs

* 022 $a $l $y $z: (ok to add $z found in the ISSN Portal for non-US titles because non-US CONSER records are not used by the ISSN Network)
* 210: Ok to add from the ISSN Portal

Discrepancies

* Too many ISSNs:
  + Mistakes: write to the responsible ISSN center; ask them to reconsider
  + Issued correctly originally; but since then, the rules have changed: do not ask ISSN centers to change their records. Instead, put current ISSN in 022 $a and move earlier ISSN to $y
* Two titles in ISSN Portal; one title in OCLC: enter the ISSN for the earlier record in an 022 $y
* Publishers print wrong ISSN on piece
  + If the mistake is made by a US publisher, write to US ISSN Center.

ISSN updates:

1. ROAD: has over 10,000 records for scholarly open access resources

URL: <http://road.issn.org>. The database is enriched with subject headings, A&I coverage, and impact factors. ROAD is intended to be an “antidote” to predatory open access publishers, also a test bed for RDF triples (later in 2014).

1. ISSN News:
   * + Gaelle Becquet is the new head of the ISSN center
     + ISSN website re-design: <http://www.issn.org>
     + Newsletter: to learn about ISSN changes and changes to the ISSN centers, sign up for the newsletter: <http://www.issn.org/newsletters/>
     + [ISSN Manual](http://www.issn.org/understanding-the-issn/assignment-rules/issn-manual/): An update will address simultaneous e-resources.