Are They Too Dynamic to Describe?

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Recorder

SUMMARY. Parks and Wang discussed the issues and challenges of cataloging integrating resources. They emphasized cataloging electronic resources such as Websites and databases. Using specific examples and citing cataloging rules and standards, the presenters looked at some of the problematic aspects of integrating resources, and suggested ways in which catalogers can use their judgment to describe the features of these dynamic materials. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@ haworthpress.com> Website: <http://www.HaworthPress.com>]*

The 2002 revisions of the *Anglo-American Cataloguing Rules, Second Edition* (AACR2) brought great change to the worlds of serials and cataloging. Specifically, chapter 12 of *AACR2* underwent its own title change from "Serials" to "Continuing Resources"; the revised chapter encompasses serials as well as a new issuance of materials called inte-

grating resources, complete with a new bibliographic level and new entry conventions. The revisions led to updates in the *Library of Congress Rule Interpretations* (LCRIs) and new MARC21 and OCLC standards to descriptively catalog integrating resources.

Integrating resources are materials with updates that do not remain discrete. In other words, the updates are not published separately as issues; they become "integrated" into the whole work itself. They may be finite or continuing. Examples include loose-leaf publications, updating databases and Websites. The presenters focused on electronic resources since catalogers most frequently encounter this type of integrating resource. While integrating resources are grouped with serials in *AACR2*, they may be assigned to serials or monograph catalogers as well as to electronic resource and metadata catalogers in different institutions. The new rules in *AACR2* are designed to provide catalogers with flexibility when cataloging integrating resources. Catalogers' judgment increasingly comes into play when describing this type of material.

Parks and Wang referred to chapters 9, 12 and 21 in *AACR2* as being the most relevant to integrating resources. Chapter 12 covers continuing resources. Chapter 9 covers electronic resources (formerly called computer files). Chapter 21 discusses choice of access points and title changes. The chief source of information for integrating resources can now come from anywhere in the resource. Catalogers should prefer the source that has the most complete information. The description of integrating resources is based on the *current* iteration of a resource. The exception is for information for the beginning dates of publication, which should be based on the first iteration, if known.

Title changes for integrated resources are treated differently from serials. Rather than using successive entry rules for title changes, integrating entry rules call for the newest title to replace the old title in the 245 field. Former titles are retained in 247 and 547 fields. The 547 field is a note field that explains complexities in title changes that cannot be explained in 247 fields.

When a cataloger believes a publication is an integrating resource, he/she should consult *LCRI* 1.0 to confirm that the item is not a monograph or a serial. If the item is determined to be an integrating resource, *AACR2* chapter 12 rules should be used in conjunction with the type of item being cataloged. For example, if a cartographic Website were being cataloged, the cataloger would consult chapter 3 of *AACR2* along with chapters 9 and 12.

New conventions for cataloging integrating resources also introduce numerous changes in MARC tagging. The largest bibliographic utility,

OCLC, promises to implement a new Bib Level 'i' for integrating resources no sooner than June 2005. Other utilities, such as RLIN, have already implemented this new Bib Level. OCLC's interim policy is to catalog integrating resources using monographic Bib level 'm.' A serial 006 field is used to bring out the continuing aspects of the resource. As a result, catalogers will be seeing monographic-like cataloging records with serial-like fields such as the 022 ISSN field, the frequency 310/312 fields, the unformatted 362 field and 580/76x-78x linking fields. The *AACR2*, 2002 revisions allows for linking between serials and integrating resources, between monographs and integrating resources, and between integrating resources. However, linking from monographs to monographs is still not allowed.

Further examples of MARC coding included a look at the most common fields in a serial 006, and a demonstration of a typical serial 006. A new code in the 006 under the fixed field element 'S/L' (entry convention) was introduced in *OCLC Technical Bulletin 247*. A code value of '2' means that the item has an integrated entry convention and follows the integrating entry rules discussed above. Electronic resources also need a 007 field to code for physical characteristics. If the item has a fixed field Type 'a' for language material, it will need an additional computer file 006 to code for the electronic resource aspects of the material.

The speakers presented case studies of integrating resources. Audience members were asked to decide on the appropriate fixed field coding for each example. Participants examined two Websites to decide when to use fixed field Type 'a' for language material versus Type 'm' for computer files. Catalogers should code for content, rather than format. A Website consisting of a bibliography of Asian studies materials was coded fixed field Type 'a' for language material. The Website for *Encyclopedia Britannica*, while considered a language material in print format, would get the fixed field Type 'm' code because the Website contains an online store, a currency converter and numerous other multimedia and online service aspects. The *Barnes and Noble Website* was easier to code because it clearly has many aspects of an online system/ service (fixed field Computer File 'j'). The distinction between fixed field Type 'a' and 'm' can be tricky. Cataloger's judgment does come into play when making a decision about Type. Type 'm' should be used in cases of doubt. These examples were deliberately ambiguous to show some of the possibilities and challenges of integrating resources, and why judgment is necessary.

The next set of case studies involved choosing the chief source of information and the title proper. Since the rules instruct that the chief source is the resource itself, catalogers are given more flexibility when choosing a title proper. The best source should present the most complete information. Introductory words such as "Welcome to" should not be included in title fields (245). They can be included as a variant title, a 246 title added entry. Title added entries should be given to all variants of a title that are considered important. After the title proper is chosen, its source should be recorded in a 500 field. There was some discussion from the audience as to the wording of source of title notes ("title from home page," "title from introductory screen," etc.). Since no standard wording for these kinds of notes exists, participants were advised to use their own judgment. Parks and Wang also said to be careful when transcribing other title information (field 245, subfield b). Subtitles can change frequently in an online environment. One audience member mentioned that she views the source code of a Website and takes the title from the metatags, if they exist, as this title is generally the most stable source for a title.

The third set of case studies focused on who was publishing the material as opposed to who was hosting it on the Web. Looking at the copyright statement or the domain name can give clues as to who is hosting versus who is publishing the Website. If considered important, make a 500 note starting with "Hosted by" for the host, and include 710 added entry. Once a publisher is established, the cataloger may need to go outside the source in order to find the place of publication. A cataloger-supplied place of publication should be enclosed in brackets in the 260 field, and use a question mark if unsure of the information.

The speakers addressed title changes next. For integrating resources, titles changes are based on integrating issuance, meaning the title proper (245 field) changes to meet the current iteration, and former titles are recorded in the 247/547 fields. Unlike a 246 field, the 247 field does not allow catalogers to put detailed information in a subfield 'i.' Catalogers should use the 547 note field to provide further details on integrating resource title changes. Dates may be added in the 247 subfield 'f,' with exact timing information of title changes if available. Approximate date information should be enclosed in angle brackets. The presenters demonstrated the use of the *Internet Archive*, or Wayback machine (*http://www.archive.org/*), which can help determine previous versions and titles. When a title changes, catalogers also need to remember to include a 500 note with the latest viewed date of the Website.

Final case studies centered on how to handle splits, merges, title re-formatting and a brief explanation of the various linking fields available. The speakers reminded the audience to make sure that links are reciprocal between records; if there is a 776 field for the print version of a title in the electronic resource record, there should be a 776 for the electronic version in the print record.

The workshop concluded with an emphasis on the basic principles for cataloging integrating resources:

- Focus on the whole publication instead of one iteration
- Focus on identification rather than transcription.

For additional guidance:

Anglo-American Cataloguing Rules. 2nd ed., 2002 revision. (Chicago: American Library Association, 2002).

"Coding Practice for Integrating Resources," *OCLC Technical Bulletin*, 247 (2002). *http://www.oclc.org/support/documentation/worldcat/ tb/247/* (1 July 2004).

CONSER Editing Guide. 1994 ed. (Washington, D.C.: Library of Congress, Serial Record Division, 1994). Updated through update 15 (2003).

Hirons, Jean L., Ed. *CONSER Cataloging Manual*. 2002 ed. (Washington, D.C.: Library of Congress, Cataloging Distribution Service, 2002).

Library of Congress. *Library of Congress Rule Interpretations*. 2nd ed. (Washington, D.C.: Cataloging Distribution Service, Library of Congress, 1990). Updated 2004, update 2.

Miller, Steve. *SCCTP Integrating Resources Cataloging Workshop*. (Washington, D.C.: Cataloging Distribution Service, Library of Congress, 2003).

Weitz, Jay. *Cataloging Electronic Resources: OCLC-MARC Coding Guidelines*. Revised July 17, 2003. *http://www.oclc.org/support/ documentation/worldcat/cataloging/electronicresources/* (1 Jul. 2004).

CONTRIBUTORS' NOTES

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