Report of the PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group

Submitted October 15, 2012 (Minor revisions December 5, 2012)

Summary

The implementation of RDA will introduce new cataloging practices to legacy databases. There has been much concern about whether the new RDA records would be compatible with existing records created using cataloging standards implemented prior to RDA. The U.S. national libraries testing of RDA determined that RDA records could co-exist successfully with non-RDA records. However, there has also been concern about whether catalogers need to know multiple cataloging standards in order to maintain current and legacy records, particularly as the attrition of catalogers with knowledge of older cataloging standards, especially AACR2 and earlier cataloging standards, continues.

After the decision was made to proceed with RDA implementation, PCC began to investigate whether it would be possible to apply any of the new conventions that RDA would introduce to non-RDA records. Based on the recommendations of several PCC Task Groups, guidelines for editing non-RDA bibliographic records during the interim period between the announcement of RDA implementation and the actual implementation date for RDA were developed, promulgated, and implemented. There was a concern that adding RDA elements to non-RDA records would create hybrid bibliographic records and whether that was an acceptable outcome.

The PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group (hereafter referred to as "The Task Group") discussed these issues. The Task Group determined that the legacy databases that PCC member libraries create and maintain already contain many hybrid records. AACR2 practices have been applied to pre-AACR2 records. AACR2 practices themselves have evolved greatly during the thirty year period of active use of AACR2, given the many significant revisions of AACR2, including the last significant revision that was implemented on December 1, 2002. PCC also brought about significant changes in the application of AACR2, first with the CONSER Standard Record, followed by the BIBCO Standard Records and the provider-neutral record concept for electronic resources. All of these bibliographic records co-exist successfully, at least for the most part, in legacy databases, especially records in bibliographic utility databases that continue to be used for copy cataloging.

There was also much concern about whether the implementation of RDA would require significant recataloging. In most cases, it is neither cost effective nor desirable to recatalog to a newer cataloging standard. The Task Group determined that adding or editing data elements in legacy records that reflect RDA conventions would cause no harm, and could result in positive changes, making the bibliographic records easier for end users to read and interpret. As manual editing of the records by catalogers can be

costly, the Task Group explored and identified changes that could be done efficiently by machine conversions or batch editing. Machine conversion could edit many bibliographic records at a time. The result of the machine conversion would be more legacy records that now resemble records created under RDA. However, the Task Group concluded that it was not desirable to create an RDA record from a legacy record solely by machine conversion. The Task Group members felt that a cataloger's judgment would be necessary in order to convert the legacy record to an RDA record (i.e. re-describe the resource) and that the PCC member libraries should be free to establish their own local policies as to when it is appropriate to re-describe a resource according to RDA.

Background

The PCC Post-Implementation Hybrid Bibliographic Records Guidelines Task Group arose from a recommendation from the PCC Task Group on Hybrid Bibliographic Records which developed guidelines for editing bibliographic records during the RDA pre-implementation period. In its final report, the PCC Task Group on Hybrid Bibliographic Records recommended the formation of a successor task group to focus on developing guidelines for the post-implementation period, including addressing machine/batch editing. Therefore, the PCC Policy Committee initiated a task group consisting of : Eugene Dickerson (Chair), Les Hawkins, Ana Cristan, Cynthia Whitacre, Georgia Fujikawa, Nate Cothran, Wanda Gunther, and Shana McDanold. The PCC Policy Committee charged the group to:

1. "Prepare guidelines for PCC monograph and serial bibliographic records to be followed after RDA implementation for the addition and changing of elements when pre-RDA records are being edited. (Another Task Group has already prepared guidelines for integrating resources.) In other words, outline what editing may be done on a routine basis to pre-RDA records to add RDA elements and incorporate RDA concepts while maintaining the record itself as cataloged according to another code.
2. Frame the guidelines within a definition and description of a "hybrid record" so that both the concept and the details will be understood by the PCC and broader professional community.
3. To begin, review the six sets of interim guidelines prepared by the predecessor Task Group for the post-testing/pre-implementation period. The integrating resource guidelines may also be helpful. These documents could form the basis for post-implementation guidelines.
4. Recommend an implementation strategy (including a rationale/explanation) and timetable for these guidelines.
5. Recommend machine or batch-editing methods (including a rationale/explanation) to accomplish addition or deletion of elements on a large scale and a time frame in which such batch editing could take place."

The Committee provided further guidance to the Task Group: "The primary goal of this Task Group is to provide clear documentation to PCC catalogers to achieve a consistent bibliographic database. A secondary goal is to find non-energy-intensive means of implementing a new set of rules on a large scale within existing databases, while gaining a maximum of the benefits from RDA."

In submitting this document, the Task Group responds to the Policy Committee's charges with a report organized as follows:

- General Introduction, including background, general editing tips, and editing recommendations
- Guide 1: Enhancing & Editing non-RDA Monograph Records
- Guide 2: Enhancing & Editing non-RDA Serial Records
- Recommendations for Machine or Batch-Editing
- Appendix A: RDA Implementation Dependencies
- Appendix B: Revision of PCC RDA Frequently Asked Questions

General Introduction

This report contains general guidelines for working with non-RDA bibliographic records after the implementation of RDA, which for the purposes of this document is March 31, 2013, the date established by the Library of Congress for its implementation of RDA and generally considered to be the beginning of wider adoption of RDA. However, the Task Group recognizes that PCC member libraries will establish their own implementation dates for creating RDA bibliographic records, so the March 31, 2013 date is not meant to be a recommendation on when PCC member libraries should begin creating RDA bibliographic records.

In this report, the term "non-RDA bibliographic records" refers to bibliographic records created according to any cataloging standard that existed prior to RDA (e.g. Anglo-American Cataloguing Rules, 2nd edition (AACR2)). The terms "hybrid record" and "hybridization" are used as follows:

Hybrid record. A non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged according to RDA) to which RDA cataloging elements have been added, either manually or via machine manipulation. The resulting bibliographic record is a considered a hybrid record, as it blends elements of previous practices with the current RDA practices, not an RDA record.

Hybridization. The process of adding RDA cataloging elements to a non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged

according to RDA), either manually or via machine manipulation. The result of hybridization is a hybrid record, rather than an RDA record.

The guidelines in this report are related to edits made to the PCC-level records shared by all (i.e., working on shared records in a utility), and when authenticating copy. Edits made to local versions of records are local decisions and not subject to these guidelines. However, the Task Group hopes that the guidelines will be useful for PCC members in determining their local policies.

The guidelines provide instructions for editing non-RDA monographic and serial bibliographic records. They are intended as tools for individual catalogers describing textual resources. They are truly meant to be general, and do not address specific formats. The Task Group hopes that individual constituent groups and/or utilities will make their own decisions regarding non-textual formats or special subject resources and provide additional documentation. While any of the edits described in the guides could be done manually, it may not always be efficient or desirable to do that. The report includes a separate section on recommendations for machine conversion or batch editing which may provide a more efficient way of modifying existing non-RDA bibliographic records.

These guidelines address specific questions about what is or is not acceptable to be changed in an existing record. The guidelines are focused around this overarching principle: editing of records created under non-RDA standards may be accomplished following guidelines for specific fields and in some cases by adding new MARC 21 fields (i.e., 336, 337, 338, and relationship designators) as long as the bibliographic integrity/identity is not affected. This allows catalogers to make use of existing non-RDA or RDA copy and minimizes instances where additional help is needed. Adding RDA elements to non-RDA records allows us to reap the benefits of clarity, additional fields and access points but does not impact the bibliographic identity of the record.

Additional advice is given on converting a record from one code to another. While the decision to convert a record to RDA may be a local one, certain considerations must be made when an institution participates in a shared cataloging environment such as the Program for Cooperative Cataloging. The impact on any bibliographic utility or other cooperative may affect the decision as well. Different utilities support different models for allowable record duplication; participants will need to respond accordingly. Furthermore, utilities may make broader decisions about member records not from PCC participants, whereas the guidelines here apply to records edited within the PCC framework. Please keep abreast of the policies of your utility, consortia, etc. The Task Group did not identify any cases for which re-description to RDA would be a best practice, preferring to leave that decision to cataloger judgment and local policy. In keeping with the emphasis in RDA of cataloger's judgment, the Task Group preferred not to define a "tipping point" at which it would be necessary to recatalog to RDA. Each cataloger should make that decision guided by established local policies. One or all of the changes described in the editing guides or in the recommendations for machine

conversion still result in a hybrid record, not an RDA record. The Task Group wanted PCC member libraries to determine when re-describing to RDA was the most effective solution.

Guidelines applicable to all the guides

- Do *not* remove valid AACR2 elements or valid RDA elements when enhancing records (rather than re-describing). Do not recode the descriptive rules for these minor additions. The goal of editing a bibliographic record should be focused on enhancing the record to improve user access to the resource by contributing to the user tasks: find, identify, select, and obtain.
- Be nice! Avoid 'editing wars' that are merely stylistic (such as style of note).
- Do no harm! Retain elements that are correct, even if you would not normally supply them yourself. If it's not wrong, leave it alone.
- Ask first if you are not sure. Use existing channels (such as the PCC, CONSER, and BIBCO listservs), contact individuals that have been trained on RDA, email LChelp4rda@loc.gov, etc.

Editing Recommendations
- If editing non-PCC records, or if editing an authenticated record, follow general guidelines for editing non- RDA bibliographic records.
- The Task Group recognizes that as catalogers gain more experience in editing PCC records in a hybrid environment, cases warranting re-description to RDA will emerge. These documents should be seen as a starting point for the conversations within PCC that will lead to ongoing developments of policies and practices consistent with local policies.
- Re-description is the conversion of non-RDA records to RDA. If a decision is made to convert, the re-description should be a complete process, where all appropriate elements are evaluated in light of RDA, and where the resource (or surrogate) is in hand. In these cases, the record should be identified as RDA by changing the code in Leader/18 (Desc:) from 'a' to code 'i' (if ISBD punctuation is present) and adding 040 $e with code 'rda' to identify that the record has been converted to an RDA record.
- All PCC libraries have the option to re-describe a non-RDA bibliographic record following RDA when first authenticating a record with 042 = pcc. Whether or not to re-describe as part of routine workflow is subject to institutional policy; however, there may be some cases where re-description may be necessary or advisable.
- Authority records: Consideration of authority records was beyond the scope of this Task Group.   The Task Group recognizes that it is a local decision as to whether the cataloger will add additional controlled access points to the non-RDA bibliographic record which would be subject to NACO authority control practices.

Recommendations for Machine Conversion/Batch Editing

The recommendations for machine conversion/batch editing contained in this report are meant to provide examples of edits that could be done to non-RDA bibliographic records and should not be considered an exhaustive list. Specifications on how the machine conversions/batch edits would be done were beyond the scope of the Task Group. The Task Group recommends that all parties who plan to do edits to non-RDA bibliographic records by machine conversion/batch editing publicize widely their specifications for doing the edits and a detailed description of what was actually edited. This information would aid PCC member libraries and the larger library community in making some decisions about machine conversions/batch editing they might want to do to non-RDA bibliographic records in their local databases. The Task Group also recommends that any machine conversions/batch edits be done as an iterative process rather than making many multiple changes simultaneously. This will allow various constituencies to become aware of and plan for any local impact that these changes might have. The Task Group recommends consulting the PCC Macros and script resources page and using it as a place to communicate specifications for performing machine conversions/batch edits.

Additional recommendations/discussions:

1. These guidelines in Guide 1 and Guide 2 are intended for individuals editing records. There is a separate section in the report addressing machine conversion/batch editing.

2. The Task Group recommends that catalogers with institutional approval be allowed to add RDA elements to or edit existing data elements in non-RDA bibliographic records as outlined in the guides.

3. Most machine conversion/batch editing could begin immediately after the March 31, 2013 implementation date. However, the Task Group recommends that the general material designation (GMD) not be removed until March 31, 2016. The three-year period post implementation of RDA would allow vendors to implement changes to their discovery services that could make better use of the data in fields 336, 337, and 338. Many of the legacy systems depend on the GMD to distinguish different bibliographic records by format (e.g. electronic resources and microforms), so the removal of the GMD from non-RDA bibliographic records might cause difficulties for libraries that are still using a legacy system that does not provide options other than the GMD for user displays. The Task Group would recommend that removal begin as soon as possible on or after March 31, 2016.

4. The Task Group considered whether there would be value in coding non-RDA bibliographic records that have undergone hybridization, either manually or via machine conversion/batch editing. This coding could make it easier to determine that the record is a hybrid record. The Task Group considered whether PCC should

develop a proposal to request a new code for the Leader position 18 (Desc. in OCLC) to indicate the hybrid nature of the record, but the Task Group decided that as Leader position 18 would be used henceforth with RDA to reflect the presence or absence of ISBD punctuation, Leader 18 was not the appropriate place for this type of code. The Task Group then considered whether a code for the 040 $e (Cataloging Source, Descriptive Conventions) could be requested from the Network Development and Standards Office at the Library of Congress that would be used to indicate the hybrid nature of the record. While The Task Group was able to identify some positive reasons for such a code, such as potential use as training tool and a quick way to identify hybrid records, the Task Group also identified some negative factors for adding a code, such as the potential burden on catalogers to add this code manually, the long-term usefulness of the code, and the possibility that the Network Standards and Development Office would not find the 040 $e to be an appropriate place for the hybrid records code. Therefore, after careful consideration, the Task Group decided not to recommend using a code either in the Leader/18 or in the 040 $e to indicate that the record has undergone hybridization and now reflected description conversions from more than one cataloging standard.

5. The Task Group recommends that the guidelines in this report replace the interim guidelines that were implemented by the PCC Policy Committee based on the report of the previous Task Group on Hybrid Records. The use of the interim guidelines would cease on March 30, 2013. The guidelines in this report would be implemented on March 31, 2013. The guidelines for working with non-RDA bibliographic records for integrating resources can be found in the [PCC Task Group on Hybrid Integrating Resource Records final report](#).

6. Finally, the Task Group recommends making this report available to the general membership of the PCC for a short comment period. The purpose of gathering comments is to be sure that wording and intent are clear in the editing recommendations and guidelines listed in the tables. The Task Group is willing to make adjustments to the report if needed after comments are received from the PCC community.

Guide 1: Enhancing & Editing non-RDA Monograph Records

Scope: This document has been written for catalogers not familiar with pre-RDA cataloging codes who are updating PCC-level non-RDA records for monographic resources. The document addresses general concerns only. Catalogers working with non-textual resources (e.g., audio files, cartographic resources), special subjects (law, music, religion), or rare/preservation resources should consult community-specific guidelines.

If you encounter a non-RDA record and want to enhance it, there are lots of enhancements you can make because they are not related to differences between AACR2 and RDA, or because they would be treated the same in each content standard. There are, however, some changes that ought to be handled more cautiously.

It is recommended that the 245 subfield h GMD be retained for a period of time and not deleted, even though this element will eventually be replaced in function by the 336, 337, and 338 fields. The Task group recommends that the GMD be considered for removal no earlier than March 31, 2016.

However if approved by your local institution, with the piece in hand, you can re-describe a resource and re-code the record as RDA instead of creating a hybrid record.

The table below identifies selected enhancements that can be made to create a hybrid record. This list is not exhaustive, but identifies the typical areas of interest.

These guidelines are, necessarily, at a general level. Record editors are advised to keep a few thoughts in mind:
- Do *not* remove valid AACR2 elements or valid RDA elements when enhancing records (rather than re-describing). Do not recode the descriptive rules for these minor additions. The goal of editing a bibliographic record should be focused on enhancing the record to improve user access to the resource by contributing to the user tasks: find, identify, select, and obtain.
- Be nice! Avoid 'editing wars' that are merely stylistic (such as style of note).
- Do no harm! Retain elements that are correct, even if you would not normally supply them yourself. If it's not wrong, leave it alone.
- Ask first if you are not sure. Use existing channels (such as the PCC, CONSER, and BIBCO listservs), contact individuals that have been trained on RDA, email LChelp4rda@loc.gov etc.

Acceptable enhancements to non-RDA records

MARC	Element	Action
006/008	Fixed length data elements	Add or modify values as necessary, including enhanced coding for literary works, references, indexes, etc.
007	Physical description fixed field	Add or modify as needed.
040 $e	Description conventions	Do not add 'rda'
0XX	Various numbers and codes	Enhance the records as desired with numbers/identifiers, coordinates, classification numbers, geographic area codes, languages codes, etc.
1XX	Main entry/creator	Correct as necessary to synchronize with authorized form
100 Indicator 1=3	Main entry/family name	Do not add a family name as creator; the concept is not valid in AACR2
130	Uniform title/Authorized access point for the work	Generally do not add or delete. For example, RDA has different requirements than AACR2 for: • identifying the first/predominant work in a compilation • identifying more than one expression of the same work (e.g., original version and one or more translations are treated in the same $l)
240	Uniform title/Preferred title	Generally do not add or delete. For example, RDA has different requirements than AACR2 for: • conventional collective titles (e.g., Selections by itself is not valid) • identifying the first/predominant work in a compilation • identifying more than one expression of the same work (e.g., original version and one or more translations are treated in the same $l)
245	Title proper, etc.	In general, leave the field as is and do not alter the following things. RDA has different conventions than AACR2 for: • indicating an incorrect title proper (e.g., "[sic]" and "[i.e.]" are used to correct a title proper in AACR2) • capitalization practices. Leave as found in

		the record. • parallel titles may only be added if found on the same source as the title proper in AACR2 • supplied title proper for resources without a collective title • using "et al." instead of transcribing entire statement of responsibility is correct for AACR2 You may correct cataloger typos, indicators, MARC content designation, etc. Retain subfield h (GMD) for a period of time, recommendation to use 3xx fields instead and to have all subfield h (GMD) removed beginning March 31, 2016. Statement of responsibility This may be left as is; OR May add or edit statements of responsibility to reflect elements not transcribed previously. Under AACR2, statement(s) of responsibility may not name more than 3 entities of the same type [3 editors, 3 authors, 3 illustrators, 3 translators, etc.] and may only be transcribed from certain sources. "[et al.]" is used if truncating a statement of responsibility. Per the RDA LC/PCC policy statement on the optional omission of names in the statement of responsibility, generally do not omit names in the statement of responsibility. Therefore, it is OK to add additional names to the statement of responsibility in non-RDA records in order to provide keyword access to this data, assuming that the cataloger has access to the resource or an acceptable surrogate. For multi-part monographs, you may change the title proper, other title information, and statement of responsibility to those of first or earlier part if the description was originally based on a later part.
246	Variant titles	Add to enhance access, as desired. Do not remove existing titles.

250	Edition statement	Do not spell out words or transcribe numerals that have prescribed abbreviations.
260 / 264	Publication, etc.	May convert 260 field to 264 field(s) if desired or add a 264 field as needed. For additional guidance on the 260/264 fields, see PCC guidelines for the 264 field. You may change Latin abbreviations "S.l." or "s.n." to their spelled out RDA equivalents "Place of publication not identified" and "publisher not identified". It is ok to leave them in the record. These are prescribed Latin abbreviations in AACR2. AACR2 follows conventions that RDA does not. Retain these conventions. RDA emphasizes a 'transcribe what you see' approach for publication, distribution, manufacture, and production statements, but that is not always the case in AACR2. For example: - do not add places that are not required in AACR2 (the 'home country' rule is applied, i.e., transcribe the first place of publication listed and, if it is not in the home country of the cataloging agency, transcribe the first place of publication that is) - do not remove larger jurisdictions not on the source of information, or 'corrections' to the place - do not remove abbreviations to places or publisher names found on the source of information, however, you may spell out abbreviations if you are confident the word was spelled out on the source - do not replace a supplied date of publication. Some dates are used interchangeably in AACR2 and are different elements in RDA. For multi-part monographs, you may transcribe different places/publishers found on subsequently cataloged parts in additional 260/264 fields.
300	Physical description/extent	For single-part monographs, correct mis-recorded data (e.g., incorrect page numbers) or other enhancements (e.g., illustrations). Feel free to spell

		out abbreviations. Do not remove brackets which indicate unnumbered pages. For multi-part monographs, update data when describing additional parts
336/337/338	Content, media, & carrier types	These may be added to enhance access.
490	Series statement	For multi-part monographs, add subsequent series statements if necessary, preceding the statements with indications of the particular parts applicable to each series title.
5XX	General notes	Feel free to provide useful notes.
504	Bibliographical references	Feel free to enhance the record with bibliographical reference and index information.
505	Contents notes	Add if desired.
520	Summary, etc.	Feel free to add.
6XX	Subject access points	Add or modify as needed, following authorized forms.
7XX	Added entry (access points)	Add additional added entries to enhance access, following authorized forms (e.g. creators beyond the first, additional contributors). Do not remove existing added entries.
7XX	Analytical added entries (access points)	Generally do not remove existing analytical added entries, particularly for compilations (treated differently in RDA and AACR2), multiple expressions, or related works/expressions.
800/810/ 811/830	Series access point	For libraries that trace series access points, provide the authorized form for the series represented in the series statement.
856	URLs, etc.	Feel free to add or modify as needed.
General	Non-Latin scripts	Feel free to add parallel fields in non-Latin scripts per PCC guideline. Do not remove existing parallel fields.
General	Relationship designators	Feel free to add approved RDA relationship designators to any access points if desired. Do not remove existing relationship designators. Change existing relator codes to relationship designators.

Guide 2: Enhancing & Editing non-RDA Serial Records

Scope: This document has been written for catalogers who wish to add RDA elements to non-RDA PCC-level records for serial resources. The document addresses general concerns only. Catalogers working with non-textual resources (e.g., audio files, cartographic resources), special subjects (law, music, religion), or rare/preservation resources should consult community-specific guidelines.

These guidelines are, necessarily, at a general level. Record editors should keep a few thoughts in mind:

- Do *not* remove valid elements when enhancing records (rather than re-describing). Do not recode the descriptive rules for these minor additions. The goal of editing a bibliographic record should be focused on enhancing the record to improve user access to the resource by contributing to the user tasks: find, identify, select, and obtain.
- Be nice! Avoid 'editing wars' that are merely stylistic (such as style of note).
- Do no harm! Retain elements that are correct, even if you would not normally supply them yourself. If it's not wrong, leave it alone.
- Ask first if you are not sure. Use existing channels (such as the PCC, CONSER, and BIBCO listservs), contact individuals that have been trained on RDA, email LChelp4rda@loc.gov, etc.

Situation	Action
Authenticating member copy	Depending on institutional policy and the usability of the member copy, may authenticate using AACR2/CSR guidelines. Or, may re-describe using RDA/CSR guidelines and either piece in hand or surrogate (for text, may be electronic surrogate).
	Where possible, include data from existing record that is not known to be inaccurate. In some cases, data may be inaccurate or inappropriate and may need to be omitted. For example, the data might apply to a different work or expression or the data might be inappropriate in a shared database (e.g., some

Situation	Action
	institution-specific 856 data).
Enhancing an ISSN pre-publication record (ELvl 7 or 8)	Depending on institutional policy, may update and further authenticate using AACR2/CSR guidelines. Or, may re-describe using RDA/CSR guidelines and either piece in hand or surrogate (for text publications, may be electronic surrogate)
Backing up an existing CONSER record based on earliest issue	Depending on institutional policy, may back up record using AACR2/CSR guidelines. Or, may re-describe using RDA/CSR instructions and either piece in hand or surrogate (for text publications, may be electronic surrogate)
Reconciling Serial with RDA Series Authority Authorized Heading	Re-describe using RDA/CSR instructions and either piece in hand or surrogate (for text, may be electronic surrogate) If not familiar with RDA, work with RDA-trained CONSER resource people.

Acceptable enhancements to non-RDA records (Consult RDA/CSR guidelines for additional information)

MARC	Element	Action
006/008	Fixed length data elements	Add or modify values as necessary
007	Physical description fixed field	Add or modify as needed.
040 $e	Description conventions	Do not add 'rda'
0XX	Various numbers and codes	Enhance the records as desired with numbers/identifiers, coordinates, classification numbers, geographic area codes, languages codes, etc.
1XX	Main entry/creator	Correct as necessary to synchronize with authorized form
100 Indicator 1=3	Main entry/family name	Do not add a family name as creator; the concept is not valid in AACR2
130	Uniform title/Authorized access point for the work	Generally do not add or delete. For example, RDA has different requirements than AACR2 for: • identifying more than one expression of the same work (e.g., original version and one or more translations are treated in the same $l)
240	Uniform title/Preferred title	Generally do not add or delete. For example, RDA has different requirements than AACR2 for: • identifying more than one expression of the same work (e.g., original version and one or more translations are treated in the same $l)
245	Title proper, etc.	In general, leave the field as is and do not alter the following things. RDA has different conventions than AACR2 for: • capitalization practices. Leave as found in the record. • parallel titles may only be added if found on the same source as the title proper in AACR2. Use field 246 to add parallel titles appearing on subsequent issues/volumes • supplied title proper for resources without a collective title

		You may correct cataloger typos, indicators, MARC content designation, etc. Retain subfield h (GMD) for a period of time, recommendation to use 3xx fields instead and to have all subfield h (GMD) removed beginning March 31, 2016.
246	Variant titles	Add to enhance access, as desired (e.g. additional parallel titles appearing on subsequent issues). Do not remove existing titles.
250	Edition statement	OK to spell out words or transcribe numerals that have prescribed abbreviations.
260 / 264	Publication, etc.	May convert 260 field(s) to 264 field(s) if desired. For additional guidance on the 260/264 fields, see PCC guidelines for the 264 field. You may change Latin abbreviations "S.l." or "s.n." to their spelled out RDA equivalents "Place of publication not identified" and "publisher not identified". It is ok to leave them in the record. These are prescribed Latin abbreviations in AACR2. AACR2 follows conventions that RDA does not. Retain these conventions. RDA emphasizes a 'transcribe what you see' approach for publication, distribution, manufacture, and production statements, but that is not always the case in AACR2. For example: - do not add places that are not required in AACR2 (the 'home country' rule is applied, i.e., transcribe the first place of publication listed and, if it is not in the home country of the cataloging agency, transcribe the first place of publication that is) - do not remove larger jurisdictions not on the source of information, or 'corrections' to the place - do not remove abbreviations to places or publisher names found on the source of information, however, you may spell out abbreviations if you are confident the word

		was spelled out on the source • do not replace a supplied date of publication. Some dates are used interchangeably in AACR2 and are different elements in RDA. You may transcribe different places/publishers found on subsequently issued parts in additional 260/264 fields.
300	Physical description/extent	OK to add if not present. Following CONSER RDA core element guidelines. Edit when closing record to indicate number of bibliographic volumes, if information is known
310	Current frequency	Edit as needed.
321	Former frequencies	Add or edit as needed. Retain all former frequency fields in the master record.
362	Dates of publication and/or sequential designation	Add or edit as needed when closing records or backing up description based on an earlier issue.
336/337/338	Content, media, & carrier types	These fields may be added to enhance access.
490	Series statement	Add subsequent series statements if necessary, preceding the statements with indications of the particular issues/volumes applicable to each series title.
5XX	General notes	Feel free to provide useful notes.
515	Numbering peculiarities notes	Add as needed.
520	Summary, etc.	Feel free to add or edit in records for electronic resources.
525	Supplement notes	Add or edit as needed.
530	Other formats note	Add as needed. Prefer $i in 776 field.
538	System details/ Mode of access note	OK to retain in record. Prefer adding 336, 337, and 338 fields instead of adding 538 field(s) for mode of access.
550	Issuing body notes	Add or edit as needed when issuing body changes.
555	Cumulative index note	Add or edit as needed.

580	Linking entry complexity note	Add or edit as needed.
588	Source of description note	Add or edit Latest issue consulted note as needed when modifying record. Add or edit Description based on (DBO) combined with title source note when backing up description based on an earlier issue.
6XX	Subject access points	Add or modify as needed, following authorized forms according to local policy
7XX	Added entry (access points)	Add additional added entries to enhance access, following authorized forms (e.g. changes in issuing body). Do not remove existing added entries.
775	Linking field for related edition(s)	Add as needed.
776	Linking field for additional format(s)	Add as needed
780/785	Linking fields for earlier/later titles	Add as needed.
787	Non-specific relationship linking field	Add as needed.
800/810/ 811/830	Series access point	For libraries that create series access points, provide the authorized form for the series represented in the series statement.
856	URLs, etc.	Feel free to add or modify as needed.
General	Non-Latin scripts	Feel free to add parallel fields in non-Latin scripts per PCC guidelines. Do not remove existing parallel fields.
General	Relationship designators	Feel free to add approved RDA relationship designators to any access points if desired. Do not remove existing relationship designators. Change existing relator codes to relationship designators.

For additional guidance on maintaining CONSER records over time, please see
Guidelines for working with RDA and non-RDA records prior to implementation of RDA

CANDIDATES FOR MACHINE CONVERSION OF BIBLIOGRAPHIC DATA POST-RDA IMPLEMENTATION

Two lists of possible machine conversions related to RDA are presented below. The first list consists of elements recommended by the task group as suitable candidates for conversion. The second list consists of an element that the task group considered, but does not recommend as a candidate for conversion at this time.

Elements may be converted by an individual library, by a consortium, by a bibliographic utility, or by a vendor of bibliographic services (such as an authority control vendor). When a file of MARC records is undergoing machine conversion, the elements listed may be converted all at once or could be applied one at a time over the course of months or years. All non-RDA records can be considered suitable candidates for machine conversion (not just AACR2 records). Converting the elements below will enable a more consistent presentation of bibliographic data to end-users.

Recommended Conversions:

- 245: Remove the General Material Designator (GMD) -- 245 subfield h (for example: $h [electronic resource])
  This conversion ought to take place beginning March 31, 2016 or as soon as possible thereafter. 336, 337 and 338 fields need to be inserted in the records before this subfield is deleted. Discovery interfaces for library systems need to develop ways of displaying the data from these 33X fields in a meaningful fashion for end-users that takes the place of the GMD in catalog displays.

- 245 subfield c: Change Latin abbreviation "[et al.]" to "[and others]"
  Catalogers with the resource in hand may manually add a number of others ("[and 6 others]") or may transcribe the names, as will not be possible with machine conversion.

- 255: Spell out non-transcribed terms and abbreviations, remove brackets, and substitute the spelled out English equivalent "approximately" for the Latin abbreviation "ca." Example for subfield c:
  (RA 16 hr./Decl. -23° ; eq. 1950) becomes
  (Right ascension 16 hr./Declination -23° ; equinox 1950)
  Note that the statement of projection is transcribed per RDA 7.26. Therefore, changing "proj." to "projection" cannot be done.

- 260: Substitute spelled out English equivalents for Latin abbreviations in the 260 field:
  "[Place of publication not identified]" replaces "[S.l.]"
  "[publisher not identified] replaces [s.n.]"

- 260, subfield c: Replace lower case c with the copyright symbol (©) before a date; replace lower case p with the phonogram copyright symbol (℗) before a date. *The advantages to doing this include consistency, readability, and clarity across records, particularly for end users who are more likely to recognize the copyright symbol (©) before a date or the phonogram copyright symbol (℗) before a date than the use of a lower case letter (c or p, respectively) to represent these symbols. While this conversion would likely do no harm, it is possible that the resulting change would not reflect accurately what appeared on the resource (e.g. if the word copyright was spelled out on the chief source) in all cases for this data element that would normally be a transcribed element.*

- 300: Spell out abbreviations and change Latin abbreviations to English equivalents. Examples:
  - p. becomes pages
  - v. becomes volumes
  - ill. becomes illustrations
  - facsims. becomes facsimiles
  - sd. becomes sound
  - ca. *(the Latin circa)* becomes approximately

  Care needs to be taken to assure that singular or plural terms are used as appropriate.

- 336, 337, & 338: Add these fields, including subfields a, b & 2.

- 500, 504, other note fields: Spell out abbreviations. Examples:
  - Includes bibliographical references (p. 299-302) becomes:
    - Includes bibliographical references (pages 299-302).
  - "Also attributed to Jonathan Swift"—Introd.   becomes
    - "Also attributed to Jonathan Swift"—Introduction.

- 502: Convert dissertation notes from a single subfield a to multiple subfields as described in LCPS for RDA 7.9.1.3.   Example:
  - 502 ## $b Ph. D. $c University of Toronto $d 1974

The task group does not recommend machine conversion of the following:

- Converting 260 fields to 264 fields.

It is not always possible to determine the role of the entity or entities given in existing 260 fields to assure correct 264 coding. Future groups may want to re-consider conversion of publication data elements.

Appendix A: RDA implementation dependencies

Task	Responsible Body	Date by which task should be completed
Disseminate approved guidelines for non-RDA hybrid records as described in the PCC Task Group on Hybrid Bibliographic Records final report	PCC Secretariat	January 7, 2013
Update PCC RDA FAQs for items related to non-RDA hybrid records	PCC Secretariat	February 1, 2013
Develop specifications for machine conversions to add or edit RDA elements to non-RDA bibliographic records recommended in the PCC Task Group on Hybrid Bibliographic Records final report	PCC Standing Committee on Automation, or a new PCC Task Group, and/or OCLC and/or member libraries	March 15, 2013
Disseminate specifications for machine conversions to add or edit RDA elements to non-RDA bibliographic records recommended in the PCC Task Group on Hybrid Bibliographic Records final report	PCC Standing Committee on Automation, or a new PCC Task Group, and/or OCLC and/or member libraries	April 15, 2013
Machine conversions to add or edit RDA elements to non-RDA bibliographic records Exception: removing the general material designation [GMD] from non-RDA bibliographic records	Bibliographic utilities, library automation vendors, and PCC member libraries	Ongoing, to begin no earlier than March 31, 2013 Begin no earlier than March 31, 2016; completion date to be determined

Appendix B: Revision of PCC RDA Frequently Asked Questions

Recommendations for changes to PCC RDA FAQs:

3.5   What does "hybrid" mean in phrases like "hybrid environment"?

Consider incorporating definitions of "hybrid record" and "hybridization" as found in the introduction of the report:

Hybrid record. A non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged according to RDA) to which RDA cataloging elements have been added, either manually or via machine manipulation. The resulting bibliographic record is a considered a hybrid record, as it blends elements of previous practices with the current RDA practices, not an RDA record.

Hybridization. The process of adding RDA cataloging elements to a non-RDA bibliographic record (i.e. a bibliographic record created according to cataloging codes that existed prior to RDA (e.g. AACR2) or a bibliographic record not coded as cataloged according to RDA), either manually or via machine manipulation. The result of hybridization is a hybrid record, rather than an RDA record.

4.1   In a hybrid record as described in 3.5, won't it be difficult to code the correct "descriptive cataloging rules?" How will we know when a record crosses the line from AACR2 to RDA?

Suggested change:

The Leader/18 in a record is not changed unless a cataloger is completely re-describing according to RDA. The final report of the PCC Post-Implementation Task Group on Hybrid Bibliographic Records provides guidelines for catalogers who wish to add or edit, either manually or via machine conversion, RDA elements in non-RDA bibliographic records for monographs and serials. For integrating resource records, the Final Report of the PCC TG on Hybrid Integrating Resource Records may also be consulted.

4.3   Should AACR2 PCC bibliographic records be re-cataloged to RDA?

Suggested change:

Generally no. The PCC recommends that AACR2 PCC bibliographic records generally not be re-cataloged to RDA. The PCC endorses the exceptions detailed in OCLC's RDA policy statement. The final report of the PCC Task Group on Hybrid Bibliographic Records provides the option to re-describe a non-PCC AACR2 record for a monograph or serial to RDA when first authenticating the record as PCC. In these cases, the record should be completely converted to RDA and labeled as RDA in both the Leader/18 (OCLC Desc) and 040 $e to make clear the integrity of the record.

However, for integrating resource records, the Final Report of the PCC TG on Hybrid Integrating Resource Records recommends re-describing to RDA whenever the latest iteration of the resource is available.

4.4   Can we code a bibliographic record RDA if it is described in accordance with RDA but contains access points supported by AACR2 headings?

Suggested change:

Beginning March 31, 2013, PCC catalogers **must** evaluate and re-code AACR2 headings to RDA authorized access points when these AACR2 headings are encountered in an existing RDA bibliographic record or needed for a newly created one.

Code as RDA: Descriptive cataloging form (Ldr/18, OCLC Desc = i, 040 $e = rda)

4.5 On a newly created AACR2 bibliographic record should catalogers use AACR2 headings or RDA authorized access points?

Suggested change:

Beginning March 31, 2013, all PCC catalogers must use RDA authorized access points on newly created AACR2 bibliographic records even if this requires evaluating and recoding an existing AACR2 heading to RDA.