

# **RECOMMENDATIONS FOR CATALOGING ELECTRONIC RESOURCES AND DISPLAY OF ELECTRONIC RESOURCES IN I-SHARE CATALOGS**

**Excerpted from the**  
***Cataloging Electronic Resources/Electronic Resources Display in the  
OPAC (CatER) Task Force Final Report***  
**by the**  
**I-Share Cataloging and Authority Control Team**  
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For the complete CatER Task Force Final Report, see:  
[http://www.carli.illinois.edu/mem-prod/I-Share/cat/archive/040419\\_cater\\_final.pdf](http://www.carli.illinois.edu/mem-prod/I-Share/cat/archive/040419_cater_final.pdf)

There are three degrees of recommendation in this document.

- “Strongly recommended” – It is hoped the recommendation will be followed without exception.
- “Recommended” – Recommendation should be followed if at all possible.
- “Optionally” – Final decision up to the individual library.

## Single versus Multiple Records

### *R1*

Where possible, create separate bibliographic records for monographs or monographic sets issued in electronic form (e.g., one for the print version, one for the electronic version). It is recognized, however, that an institution may have reasons to use a single bibliographic record for multiple formats of the same monographic title, especially if records are imported from vendors like Marcive.

### *R2*

Each I-Share library has the option to use a single record for all physical manifestations of a serial title or to use separate records for each manifestation.

### *R3*

If a library uses the single bibliographic record approach for serials or monographs, creation of separate MFHDs for each physical format is strongly recommended.

### *R4*

If the separate record approach is used for serials, the Task Force recommends using the aggregator-neutral record concept developed and implemented by CONSER for electronic serials available from one or more providers.

### *R5*

It is recommended that each MFHD representing an electronic resource be assigned a location specifically designated for electronic resources rather than for any other physical format. Each I-Share library may make its own decisions about how many electronic resource locations to create and what names to give them.

### *R6*

When separate bibliographic records are used for print and electronic versions, it is strongly recommended that:

- each bibliographic record should contain a 530 and 776 field;
- the bibliographic record for the electronic version should contain a 007 field; and
- the MFHD for the electronic version should contain a 007 and an 856 field. (See also R9.)

## *R7*

When a single bibliographic record is used for both print and electronic versions, it is strongly recommended that:

- the bibliographic record should contain a 007 and a 530 field, and may contain 776 field if appropriate;
- a separate MFHD for each physical format should be created; and
- the MFHD for the electronic version should contain a 007 and an 856 field. (See also R9.)

## *R8*

Optionally, an I-Share library may choose to include a 530 note in a record even if it does not hold the alternative version, since its patrons may have access to another library that holds that version.

## **The 856 Field Recommendations**

Each I-Share library can, within the I-Share WebVoyage Customization Guidelines, make local decisions for its own OPAC. These decisions might vary from the consortial decisions made for the display of information in the I-Share Catalog (Universal Catalog).

## *R9*

It is strongly recommended that the URL appropriate to an I-Share library's local users be placed in the 856 field of the MFHD record. The URL appropriate to local users may or may not be "sharable" (i.e., appropriate to the users of other I-Share (or any) libraries).

## *R10*

It is strongly recommended that libraries retain any extant shareable URLs (those which may be generally useful to any library's patrons) in the bibliographic record. Libraries may opt to retain these URLs in the 856 field of the bibliographic record or in a 596 field. Libraries would use the 596 to retain a URL if they display the bibliographic record's 856 field in their local catalog and the URL in the record appears to be shareable but is not appropriate for local users.

## *R11*

It is strongly recommended that all URLs be verified at the time they are added to the catalog.

## *R13*

I-Share libraries may decide whether or not to display bibliographic record 856 fields, as allowed by current WebVoyage customization guidelines.

## *R14*

It is strongly recommended that URLs in MFHD 856 fields be kept current. Xenu is a software utility for link-checking that has been documented by CARLI for use in our

Voyager environment; see [http://www.carli.illinois.edu/mem-prod/I-Share/cat/using\\_Xenu.pdf](http://www.carli.illinois.edu/mem-prod/I-Share/cat/using_Xenu.pdf) for more information.

#### *R15*

If a library chooses (R13) to configure any of its OPAC Views to display data from 856 fields of bibliographic records, then it is strongly recommended that the library keep the 856 fields in both bibliographic records and MFHD records current.

#### *R16*

It is strongly recommended that when a library adds an 856 field containing a non-shareable URL to a bibliographic record, any shareable URL in an existing 856 field be transferred to a 596 field. This recommendation applies whether or not the library currently displays the 856 field in the bibliographic record.

#### *R17*

It is recommended that, if catalogers add a non-shareable URL to a bibliographic record, they add a note in the 856 subfield x or z identifying that URL with their institution.

#### *R18*

It is recommended that, if catalogers add a shareable URL to a bibliographic record, or encounter one already included in the record, and if they know that access to the resource is restricted (to users affiliated with a particular institution, for instance), they add a statement of restriction in a public note field (856 subfield z or 852 subfield z).

#### *R19*

It is recommended that libraries use neither the 856 field nor any other field for archiving obsolete URLs in library catalogs.

#### *R20*

If there are multiple active URLs for a serial title, all of which lead to some part of a library's online holdings, it is strongly recommended that a separate MFHD be created for each applicable URL in cases where a single MFHD would result in a confusing OPAC display.

#### *R21*

If there are multiple active URLs for a monographic title, all of which lead to some part of a library's online holdings, it is recommended that a separate MFHD be created for each applicable URL.

#### *R22*

If a library has compelling reasons to use a single MFHD for a monographic title (that is, if a library cannot follow recommendation R21), or if a library is convinced that a single MFHD for multiple, active URLs for a serial title would not result in a confusing OPAC display (see R20), then it is strongly recommended that catalogers create separate 856 fields for each applicable URL in the MFHD.

*R23*

I-Share libraries should not include 856 data in the 866 field of the MFHD, as was the practice when our consortium used the DRA system.

### **Related Recommendations**

*R29*

Creation of item records for electronic resources is not recommended. (The single exception to this recommendation is the e-item record used in Voyager reserves.)