IFLA Cataloguing Section's ISBD Review Group

Status report of activities: 2005-2006

Second General Review Project:

The object of the "Second General Review Project" is to bring the ISBDs into conformance with provisions of the Functional Requirements for Bibliographic Records that define the basic-level national bibliographic record. To date, three ISBDs have been revised and republished, two more are expected to be revised by the Review Group and republished, and one is expected to be sent to the Cataloguing Section for voting this year. The situation is as indicated in the table below:

Name of ISBD:	Status:
ISBD (M)	2002 revision published on IFLANET.
ISBD(CR)	2002 revision published by Saur and on IFLANET.
ISBD(G)	2004 revision published on IFLANET.
ISBD(A)	Study Group appointed; worldwide review of draft conducted
ISBD(ER)	Worldwide review conducted; Cat Sect SC voting resulted in issues to be discussed after consolidated ISBD aproval
ISBD(NBM)	Preparation of revision postponed while Consolidated ISBD is drafted.
ISBD(CM)	Worldwide review conducted. Ready for submission to RG Fall 2005, assuming resolution of issues related to ISBD(ER) (noted above).
ISBD(PM)	Preparation of revision postponed while Consolidated ISBD is drafted.
ISBD(Component Parts)	An electronic version of the 1988 edition was published on IFLANET in Sept. 2003.

This year all the efforts have been concentrated on the elaboration of the consolidated edition of the ISBDs. For this reason all ongoing revisions were postponed:

ISBD(ER) was forwarded to the Cataloguing Section's Standing Committee for balloting. Although the overwhelming majority approved the document, one vote dissented; raising issues that the Review Group decided should be discussed and resolved.

The draft of ISBD(CM) was also submitted for world-wide review, and comments have been processed; however, provisions related to those in dispute regarding ISBD(ER) that needed to be settled before proceeding further were postponed until a Consolidated ISBD work is finished.

The outstanding issues in these revisions are as follows:

Area 3 was discussed by the Study Group on Future Directions in Frankfurt (see below), where it was decided that this area must be considered by the Review Group as a whole. Although area 3 for electronic cartographic material, serials, and music presentation statement was judged not to be problematic, it was determined that this area should not be used within descriptions for electronic resources. However, until the Material Designation Study Group recommends how to proceed with GMDs and area 5, area 3 is being retained as an optional element for those who need to use this area for electronic resources. For those who want to use area 3, it could be left as an optional element; however, many cataloguers already do not use area 3.

Area 5 must also be considered again as it presents different options. Although there is apparent agreement that the default to omit area 5 for remote-access electronic resources, there are communities that feel strongly that an option should be allowed to use an SMD equivalent to that for print resources. In these communities, it is considered important to users of the catalogue by facilitating their identification and selection of such resources. Also, since area 5 is considered to include "extent", the number of files and/or size could be included here. For direct access electronic resources, the default would be to record the number of physical units of the carrier, while providing an option for giving in addition to the physical carrier an appropriate term taken from area 5 for the type of material; e.g. "450 maps on 3 CD-ROMs". Related to this issue is the broader question yet to be decided of whether the ISBDs should allow different options or not, given the effort to achieve harmonization between ISBDs through the Consolidated edition.

ISBD(A) Study Group

Regarding ISBD(A), the chair of the Study Group, Gunilla Jonsson, reports:

"The draft for a revised ISBD(A) was issued for world-wide review in February 2006 and responses were due on May 1 this year. It had eight responses, after which the Study Group has been involved in the process of revising parts of the proposal in the light of

the results of the world-wide review. This process also carries editorial corrections to a considerable degree. A revised draft has been ready and sent to the ISBD Review Group before the 21st of June this year."

The group has made a very thorough study of the ISBD(A) rules, also taking into consideration other rule revisions that are currently underway. The revision has been comprehensive and it has obviously been difficult for all members to always meet the deadlines for commenting.

From this revision process it has been highlighted that "The opinions in the Study Group as well as the responses are divided along two main lines, a) stick to the ISBD structure, and when that comes in conflict with the faithful transcription needed for identification, provide the information to support identification in notes, and b) record the descriptive information according to the identification needs and support it with authorized and standardized access points – the latter, obviously, are not part of the ISBDs and would only be commented on at a general level.

These two lines do run together on a number of issues in all ISBDs. Nevertheless, they bear witness to a fundamental disagreement and, more importantly, to already existing differences in cataloguing approach and praxis."

A fuller report of this Group's activities accompanies this document.

Study Group on Future Directions of the ISBDs

The Study Group on Future Directions of the ISBDs, chaired by Dorothy McGarry, met 5-8 April 2005, in Frankfurt am Main, Germany, with the support of the Deutsche Bibliothek, in order to further its work toward a consolidated ISBD. The participants were Dorothy McGarry, Françoise Bourdon, Elena Escolano Rodríguez, Renate Gömpel, Lynne Howarth, Agnès Manneheut, Eeva Murtomaa, and Mirna Willer.

Previous to this meeting the Study Group highlighted primary problems and suggestions for the ISBD Review Group to consider, and a statement of objectives and principles that give guidance to the Study Group was prepared and commented and approved by the Cataloguing Section. This phase was completed by the end of 2005.

Next, the Study Group worked on the stipulations, taking into consideration responses from Review Group members, in order to have a text ready for the meeting in April 2006 at the Deutsche Bibliothek. According to a general outline to be followed for each area agreed last year: the structure should be changed; present stipulations will be fit into the new structure; some changes will be made due to the need to generalize wording; the GMD should be moved from after the title proper to another location; published (validated) versions will be used as the basis on which to work at the first stage; a further step will include changes to stipulations, eliminating discrepancies, and updating provisions for those materials that have not been revised, in order to improve the text by

bringing in new ideas and consideration of the needs of cataloguers and users of the catalogue.

The consolidated ISBD draft was ready on 16th May 2006 for review by the Study Group and the Review Group. Following that, a revised draft has been sent out for world-wide review during mid-July through mid-October 2006. Following consideration of the responses received in that review, the Study Group will prepare a recommended text to be sent to the Review Group by late 2006 for approval. Pending approval, the consolidated ISBD would then go to the Cataloguing Section Standing Committee for a vote.

The Study Group looks forward to a final consolidated ISBD being ready for publication early in 2007.

"The Study Group found that it is difficult to have the consolidation process going on at the same time as the world-wide review process for the ISBD(A). The Study Group decided it would include information related to older monographic publications as it was in the published version, with the expectation that following approval of a new ISBD(A) that information can be changed to match the revised edition. Because the ISBD(CM) had been revised following world-wide review although it had not been sent for a Standing Committee vote before further work was suspended pending work on the consolidated ISBD, and because the ISBD(ER) had been sent for a vote of the Standing Committee although it had not been declared passed before further work was suspended, provisions from those two documents were taken into consideration. In addition, the Material Designations Study Group has not yet finished its work, so the GMD was left as it was with the understanding that it would be moved to a different location in a record and changed after a report is received from that group.

Outside groups of specialists will have to be contacted, especially for the stipulations covering the two ISBDs that have not been worked on for revision, the ISBD(PM) and the ISBD(NBM). The International Association of Music Libraries, for example, will be sent a draft for comments on music stipulations."

The Study Group on Future Directions of the ISBDs will meet twice during the Seoul Conference: on Monday 21 August at 16:00-18:00, and on Tuesday 22 August at 13:00-15:00. Both sessions will be held in the room 208/B. Interested parties are welcome to attend and participate.

A fuller report of this Group's activities accompanies this document.

Material Designation Study Group

This group, chaired by Lynne Howarth, is dealing primarily with questions deriving from the ISBD Future Directions Study Group.

In Oslo 2005 conference was decided the Material Designations Study Group (MD SG) begun discussions on two issues that had been identified for further work, namely:

- placement of the general material designation [gmd]
- identification, clarification, and definition of content and nomenclature of the gmd, area 3, area 5, and area 7

It had become clear that the MD SG's work on terminology and nomenclature would need to parallel and complement the work of the Study Group on the Future Directions of the ISBDs (Future Directions SG) as it prepares, first, the harmonized text, and, subsequently, the consolidated ISBD. The MD SG decided that, as individual areas of the harmonized text are completed, the SG will examine and evaluate terminology used currently in the authorized ISBDs and will make recommendations for the content and terminology to be used in the gmd, and areas 3, 5, and 7 as appropriate in the proposed consolidated ISBD.

Having addressed the terminology/nomenclature issue, the Study Group then turned its attention to problems associated with where to place or locate within the record the general material designation. During its meeting at IFLA WLIC 2004 in Buenos Aires, the MD SG had agreed on the importance and primacy of the gmd as an "early warning device" for catalogue users, and, consequently, focused its discussion on consideration of a separate, unique ISBD area for gmd. During its Oslo meeting, the SG remained sensitive to the implications of a so-called "area 0" for record formats, vendor software, and OPAC/WebPAC displays. Nonetheless, after thoughtful and wide-ranging discussion, the MD SG formalized a recommendation that the ISBD Review Group subsequently gave the Study Group approval to pursue further (at its second Oslo meeting of August 18, 2005).

Proposed MD SG recommendation approved by the ISBD Review Group, August 18, 2005, Oslo meeting:

Recognizing the ongoing difficulties with the current optionality, terminology, and location/placement of the general material designation [gmd], and anticipating that the Future Directions Study Group may be working towards producing a consolidated ISBD for which a Document Type Definition (DTD) can then be developed, the MD SG proposes the creation of a separate, unique, high level component (not a numbered ISBD area) – a "content/carrier" or "content/medium" designation that would be mandatory – i.e., not optional as with the current gmd -- for recording in bibliographic records.

The MD SG emphasizes that this component is independent of system displays – that is, different systems can display the recorded content of the "content/carrier" or "content/medium" designation as each system vendor or client institution determines appropriate, and particularly if the component is a part of the DTD that a style sheet will interpret for display (or not, as a library and/or system vendor determines).

Benefits: The MD SG believes that several benefits derive from this proposal, as follows:

- a separate, unique, distinct component makes explicit important information regarding the content and medium of a resource
- as the order and location of the component is not specified (DTD elements can be ordered according to style sheet specifications), there is flexibility as to how the "content/carrier" (or "content/medium") information displays
- the creation of a unique component, along with specification of its content, will help to focus the content of area 3 (i.e., truly unique/exceptional material), area 5, and, to some extent, area 7. Thus, terminology within each element will be more precise and distinct, addressing current problems with information overlap across related areas
- a separate component, rather than a named and ordered area within the current ISBD framework, may encourage rethinking of the numbering, naming, defining, and ordering of data elements for the future ISBD consolidated.

Next Steps for the MD SG: Having determined a unique place for designating content/carrier, or content/medium, the Study Group can now focus on what information to embed within that component (gmd), as well as within areas 3, 5, and 7. The MD SG will work closely with the Future Directions SG, and will also liaise with the JSC appointed GMD/SMD Working group. Tom Delsey will be consulted as appropriate or required for "sorting", clarifying, and defining terminology as it evolves throughout the process.

AACR3/RDA
The Review Group continues to monitor postings to the Joint Steering Committee's internal Web site to follow the progress of development of AACR3, now to be renamed Resource Description and Access.

INVITATION
The ISBD Review Group will meet twice during the Seoul Conference: on Sunday 20 August at 13:45-15:45, and on Wednesday 23 August at 13:00-15:00. Both sessions will be held in the room 208/B. Interested parties are welcome to attend and participate.

Submitted by Elena Escolano, Chair
June 29, 2006