

## FINAL REPORT OF THE EXPERT ADVISORY GROUP TO REVIEW THE GUIDELINES FOR THE CATALOGUING OF ELECTRONIC RESOURCES

### Introduction

The Libraries Australia Advisory Committee at its meeting in February 2006 recommended that an Expert Advisory Group (EAG) be established to review and update the Libraries Australia guidelines for the cataloguing of electronic resources and to provide advice on actions that Libraries Australia could take to encourage improved library workflows for managing access to e-resources.

### Terms of Reference

The EAG's terms of reference are:

- Review the issues relating to the cataloguing of electronic resources on the National Bibliographic Database;
- Facilitate discussion with Libraries Australia users on this issue;
- Review and, if necessary, update the Libraries Australia guidelines for the cataloguing of electronic resources;
- Provide recommendations to Libraries Australia on actions it could take to encourage improved library workflows for managing access to e-resources

### Membership

In July 2006 expressions of interest for membership of the EAG were sought via Libraries Australia-L. All expressions were accepted and the EAG members are:

- Anatta Abrahams (State Library of NSW)
- Carmel Denholm (State Library of Tasmania)
- Lisa McIntosh (University of Western Sydney)
- Dorota Pudlowski (La Trobe University)
- Julie Whiting (National Library of Australia)
- Bemal Rajapatirana (Libraries Australia) (Secretary)
- Rob Walls (Libraries Australia) (Convenor)

### Report on Progress

As reported previously, this EAG met for the first time on 30 August 2006 and draft *Guidelines for cataloguing remote access electronic resources* were made available for comment via the EAG web page on 28 September. The EAG considered the comments received from Libraries Australia users and many were incorporated into the guidelines. Following further EAG teleconferences, the final version of the guidelines was completed in January.

The new guidelines were made available on the Libraries Australia web site ([http://www.nla.gov.au/librariesaustralia/dg\\_raer.html](http://www.nla.gov.au/librariesaustralia/dg_raer.html)) and publicised via email lists during February. They provide guidance and advice when cataloguers are creating or editing bibliographic and holdings statements for remote access electronic resources.

The guidelines consolidate, extend and replace the previously and separately issued electronic resource guidelines:

- Guidelines for cataloguing of electronic resources
- Guidelines for the Cataloguing of E-Book resources
- Guidelines for electronic resource holdings statements on the NBD

The main changes compared with the previous guidelines are:

- adoption of an aggregator neutral record policy
- recommended and preferred use of persistent identifiers in the Electronic location field (856)
- the requirement for availability notes in holdings statements only when items are not available for document delivery or have other access restrictions
- the option to include an extent statement for remote access materials
- optional inclusion of the Electronic location field (856) when using the Additional physical form note (530) when describing both the original and alternate form in a single record
- systems requirements notes only for detailing special access requirements and not for standard browser access
- inclusive examples for a range of material types (e.g. monographs, journals, thesis)
- the practice of using a series added entry field (830) to aggregate records within datasets will be discontinued.

The discontinuation of the use of series added entry fields (830 tags) will require a transition period for some electronic collection sets established and maintained by Libraries Australia. Staff need to determine the impact of this change on the ability to produce the current dataset products and on the co-contributors who supply data, for example, the Australian Bureau of Statistics who supply data for their AusStats collection. It will be possible to use field 091 to flag some datasets however further investigation is needed to determine if this solution will work for all datasets.

Libraries Australia are in the process of reviewing the specific policy changes in these guidelines and where required will apply any relevant changes to the general Cataloguing Standards pages on the Libraries Australia web site and also to the Cataloguing Client manual. As an example, the Libraries Australia Cataloguing Standards documentation will be updated to reflect that physical description is now permitted for remote access resources in tag 300.

During its meetings the EAG also recommended a number of actions which Libraries Australia could take to support improved library workflows for managing access to e-resources:

1. Currently Libraries Australia has an agreement with Serials Solutions whereby Australian Serial Solutions customers can opt to have a copy of their data supplied to the ANBD. The EAG recommended that Libraries Australia investigate establishing similar arrangements with other e-resource management services such as Ebsco, Swets and TDNet.
2. Improve access to e-resources by including e-resource management services in national consortium licencing proposals, and include provision for Australian library holdings from these services to be copied to the ANBD.
3. Establish a wiki to facilitate discussion of e-resource workflow issues.
4. Consult with Libraries Australia users as to whether it would be desirable to produce guidelines for the cataloguing of physical format e-resources or whether these are adequately covered in existing cataloguing standards and guidelines.
5. If needed, add a new encoding level to flag machine generated records and those converted to MARC 21 from other schema such as Dublin Core.

6. Request a change to MARC 21 bibliographic and holdings formats to support a flag for “freely available” online resources. Currently these are flagged using free text in subfield 856\$z.
7. Develop a link checking service to advise the publisher or record contributor when broken links are found in ANBD records.
8. Encourage libraries to contribute updated URLs to the ANBD.

### **Recommendation**

That the Libraries Australia Advisory Committee note the report and record its’ thanks to the members of this Expert Advisory Group.

Libraries Australia Database Services

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