

Updating Loose-leafs Checklist

Guidelines updated for RDA, to the extent possible.

On this page: definitions, pre-cataloging decision, when to make a new record, copy cataloging, related documents.

KEY DEFINITIONS

INTEGRATING RESOURCE/IR: "A resource that is added to or changed by means of updates that do not remain discrete and are integrated into the whole (e.g., a loose-leaf manual that is updated by means of replacement pages a website that is updated continuously." **RDA Glossary**. Under AACR2, serials and integrating resources were categorized as Continuing Resources, a term that is not used in RDA.

ITERATION: "An instance of an integrating resource, either as first released or after it has been updated." **RDA Glossary**.

LOOSE-LEAF SERVICE. "A loose-leaf service is a publication issued in several component parts, often in a combination of updating loose-leaf and bound volumes containing both primary and secondary source material. Sometimes a loose-leaf service is called a reporter." **LC-PCC PS 0.0 Loose-Leaf Services**

TRANSFER VOLUME. "A transfer volume is a bibliographic unit containing material of a permanent nature originally issued as a section or binder of a loose-leaf service. The material is transferred from the loose-leaf mode by one of the following methods: the material is reissued by the publisher in bound form and sent to the subscriber as part of a subscription or made available for separate purchase; the material is transferred from the original loose-leaf mode to permanent binders (sometimes supplied by the publisher) or bound separately by the subscriber." **LC-PCC PS 0.0 Loose-Leaf Services**

UPDATING LOOSELEAF. "An integrating resource that consists of one or more base volumes updated by separate pages that are inserted, removed, and/or substituted."--**RDA Glossary**. Example: the hardcopy version of RDA.

Pre-Cataloging Decisions:

1. LC-PCC PS 0.0. B. Mode of Issuance: Integrating Resource?

- Serial vs. IR. If the resource has wording referring to "edition" or the equivalent, determine if the wording represents a numeric designation or an edition statement. If a numeric designation, catalog as a serial; if an edition statement, catalog as an IR
- Monograph vs IR. If there is likelihood that the resource will be updated & the updates will not be discrete (i.e. a serial), catalog as an IR. If there is no indication the resource will be updated, catalog as a monograph.

2. **LC PCC PS 0.0. Situations Requiring Further Consideration. B. LC PCC practice. Resources issued in loose-leaf format.** Base the decision on the primary component; if there is a stated frequency, determine if the frequency applies to the primary component or any updates.

- Catalog as monograph if complete as issued or complete in a finite number of parts
- Catalog as serial if issues remain discrete even if to be housed in a binder, or, binders issued successively even though contents issued in an integrating fashion
- Catalog as an integrating resource (updating looseleaf) if binders in which pages are added, removed, or replaced until the next edition of resource is published or until complete

Updating Loose-leaves Checklist

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3. **LC PCC PS 0.0. Situations Requiring Further Consideration. E. Republications.** Republication of an integrating resource: catalog as monograph or integrating resource depending on type of issuance of the republication.

4. **LC-PCC PS 0.0. Loose-leaf services.** See definition above. Generally create only one bib record for the service as a whole; consider the service as a whole to be an integrating resource. In a note, list the component parts in enough detail to identify them. Give any volume designation that is found on a part.

Exceptionally, if separate records are created for the component parts, identify each part as an updating loose-leaf, multipart monograph, etc. and catalog accordingly. In a note, indicate the relationship to the parent loose-leaf service and give an AAP for the loose-leaf service.

- For pamphlet or sections with independent numeric/chronological designations (e.g. newsletters) issued as part of the service, refer to the PS for detailed instructions and examples
- For Transfer Volumes (see definition above): Generally, do not create a separate record for the transfer material. Instead, on the bibliographic for the loose-leaf, give a note explaining the inclusion of transfer material of permanent value. See the PS for details and examples.

For more details and many examples, consult LC PCC PS 0.0 Loose-leaf Services.

CHANGES REQUIRING A NEW DESCRIPTION

Instructions for when to make a new record for an integrating resource may be found at **RDA 1.6.3**.

1.6.3.1. IR changes to a multipart or serial, or vice versa.

1.6.3.2. Change in Media Type (print to CD-ROM [unmediated to computer], but not CD-ROM to online resource [computer to computer]). LC PCC PS adds that if the media type varies within the integrating resource, add information to the record explaining the variation but do not make a new description.

1.6.3.3. Re-basing of an integrating resource. A new description is made if a new set of base volumes is issued for an updating loose-leaf. LC-PCC PS: if the edition statement changes and/or the publisher issues a new base volume or volumes:

1. Do not make a new record if the publisher issues a replacement title page with a new edition statement but does not issue a new base volume. Change the edition statement and give a note about the change in edition statement.
2. Do not make a new record if the publisher issues a new base volume, but the volume has various dates in the header/footer or other indications that the publisher has reissued the content as of its latest iteration. Make a DBO note if creating a record for the first time.
3. Conversely, if the publisher issues a new base volume but the header/footer dates are consistent with the date of the new issue, make a new record. If an edition statement is lacking, supply one in brackets, e.g. 250 [2003 edition]
4. Make a new record if the original base volume had revision dates in the header/footer and the new base volume has no revision dates in the header/footer.
5. When in doubt, make a new record.

1.6.3.4. Make a new record if there is a change in edition statement indicating a significant change to the scope or coverage of an integrating resource. Note that the LC PCC PS 1.6.3.3 item 1. narrows the scope of this instruction.

Two other situations that would result in a new record: merger of existing bibliographic resources; a split into separate resources. However, in most cases a new base volume would need to be issued, and 1.6.3.3 would probably apply.

COPY CATALOGING CHECKLIST

Updating Loose-leafs Checklist

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If the iteration in hand is later:

- Update the description and add access points to reflect Yale iteration as needed
- Accept the 264 ̄c in copy cataloging record (if the loose-leaf was cataloged as AACR2, leave the 260 tag as is)
- Add notes and access points if different information on other library's earlier iteration is important
- Add or update the "Description based on" note to reflect Yale iteration; re-tag the DBO note to 588 if it has been tagged as 500
- Update 008 and update/add Serial 006 as needed

If the iteration in hand is earlier:

- Do not change the description to reflect the Yale iteration
- Accept the 264 ̄c in copy cataloging record (if the loose-leaf was cataloged as AACR2, leave the 260 tag as is)
- Add notes and access points if different information on Yale's earlier iteration is important
- Do not change the "Description based on" note to reflect the Yale iteration
- Do not change the 008/006 to reflect Yale's iteration; add Serial 006 if lacking

RELATED DOCUMENTS

[Integrating Resources: a Cataloging Manual](#) [1] <not updated for RDA yet; this document may cite as IR:CM >

Sources - Manifestation Attributes - Carrier

Basis for Description for Loose-Leafs Considered as Integrating Resources

RDA 2.1.2.4. Choose a source of information identifying the current iteration of the resource as a whole. Make a note identifying the latest issue consulted in making the description. (See item 9. below).

RDA 2.2.2.2. Preferred sources of information. Since an updating loose-leaf is by definition a printed text, the preferred sources are: title page, title sheet, or title card (or image thereof). In the absence of a title page, etc., use the first of the following sources that has a title:

- a. a cover or jacket issued with the resource (or an image of it)
- b. a caption
- c. a masthead
- d. colophon

If none of these has a title, use another source within the resource where the title is formally presented. If no title can be found on the resource, apply 2.2.4 for external sources.

If the title appears in different languages or scripts, apply 2.2.3.1. If the preferred sources have different dates, apply 2.2.3.2. If the preferred source is for a facsimile or reproduction of an original, catalog the facsimile/reproduction (in which case it is unlikely to be an integrating resource & is likely to be cataloged as a monograph).

Description (02x, 245-490 & Notes)

1. Identifiers. If both an ISBN and an ISSN are present, give both.

Updating Loose-leaves Checklist

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RDA 2.15.1.7 Give the qualifier "(loose-leaf)" to resource identifiers such as ISBN & ISSN (but not to LCCN, which is a record ID number).

02			‡a 0105281984 (loose-leaf)
0			
02			‡a 0914-1968 (loose-leaf)
2			

MARC21 field 222. Only ISSN centers can enter this field.

2. RDA carries over the AACR2 2002 amendments. Note that the integrating resource instructions are under Exceptions in the RDA rules.

- Introductory words (**RDA 2.3.1.4** / AACR2 1.1B1)
- Typographic error (**RDA 2.3.1.4** / AACR2 12.1B1)
- Full form vs. acronym/initialism (**RDA 2.3.2.5** / AACR2 12.1B2)

EXAMPLES are for the most part from IR:CM, and may not be in OCLC or the LC databases.

245	0	0	‡a Current guidelines in home health care ...
246	1	_	‡i Title appears on item as: ‡a AMA presents current guidelines in home health care

Although the default **RDA 2.3.1.4** rule is to transcribe errors as found, an exception is made for serials and integrating resources:

245	0	0	‡a Social security compensation forms ...
246	1	_	‡i Title on 2002 t.p.: ‡a Social security compensation forms

When both the spelled-out form and the acronym appear on the item, **RDA 2.3.2.5** instruction is to choose the spelled-out form as the title proper.

245	0	0	‡a Reading exercises and diagrams : ‡b READ ...
246	1		‡a READ

3. **RDA 2.3.4.3 Other title**. Serial catalogers tend to drop the other title unless it falls into certain categories (includes name of issuing body; is the acronym of the title proper). A common CONSER practice is to leave transcription of the other title to cataloger judgment, but the current BSR has the other title mandatory, with no exceptions given. Catalogers of updating loose-leaves will generally not follow the restrictive serial cataloging practice and should include the other title unless it consists solely of words indicating currency of contents. For examples of notes, see 12.

4. **RDA 2.4.1.4. Statement of Responsibility**. With regard to transcribing editors in the statement of responsibility, RDA allows omission for serials cataloging only. Catalogers of updating loose-leaves will ordinarily transcribe editors. As with monograph cataloging, technical editors within the publishing company are not generally transcribed.

5. **RDA 2.5.2 Designation of Edition** Mandatory, but note that the **LC-PCC PS 0.0 Mode of Issuance** section instruction considers "edition" or the equivalent used as a numeric designation as evidence that the loose-leaf is a *serial*. See the section on the previous page. The designation should be recorded as found.

250			‡a Version 2.5.
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6. However, per **RDA 2.5.2.5 Statements Indicating Regular Revision or Numbering** for serials and integrating resources, "record statements indicating regular revision as a note on frequency." See **RDA 2.17.12 Note on Frequency**.

310			‡a Revised edition issued every six months
31			‡a Including quarterly updates
0			

7. **MARC21 field 362**. AACR2 practice was to use 362 only for notes about dates when no explicit statement was available; numbering was not included in 362. Although integrating resource practice has not been explicitly defined, it appears that the CONSER practice of using 362 1 for numeric/chronological designation is being applied to loose-leaves as well as serials in RDA cataloging.

LCCN 2013274121

362	1		‡a Began with report no. 50 (Dec. 16, 2013)?
-----	---	--	--

LCCN 2013200823

362	1		‡a Began with: 3rd Qtr.
-----	---	--	-------------------------

Updating Loose-leaves Checklist

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2012.

8. **RDA 2.8.6.5: 264 ‡c.** Give the dates of the first and last iterations (not the same as the earliest/latest dates available/in hand!).

- If the first/last iteration is not in hand, but there is an EXPLICIT statement about the first/last iteration on the iteration in hand, the date is recorded in square brackets in 264 ‡c
e.g., Introduction: "Began publication in in 2000."

264 | | | ‡a ____ ‡b ____ ‡c [2000]-

- If there is no explicit statement, record nothing in 264 ‡c (not even a temporary date in <angle brackets> as is done with multiparts)
- If there is non-explicit information available about the first/last iteration, record in 362 1. Don't spend time researching:

3621 | | ‡a Began in 2000?

3621 | | ‡a Began publication in 1998 or 1999.

3621 | | ‡a Completed publication in 2001?

9. **RDA 2.17.3.4 Iteration Used as the Basis for the Identification of an Integrating Resource.** MARC 588 field should be used. There is no LC PCC PS, so until the Integrating Resources module of the CONSER manual is revised, based on the RDA examples, the IR DBO note would be formulated as:

58 | | | ‡a Identification of the resource based on: 1994 ed. through update 10.
8

The example above might be inconsistent with the LC PCC 0.0 PS, but perhaps "1994 ed." is the edition statement with numbered updates or iterations.

58 | | | ‡a Identification of the resource based on version consulted: Oct. 26, 2000.
8

No harm/no foul if the standard CONSER language is used:

588 | | | ‡a Description based on:
1994 ed. through update
10.

For integrating resources, the description is always based on the latest iteration consulted, so it appears that a 588 Latest issue consulted is superfluous. However, this also means that the DBO 588 must be updated (and the description re-checked) when a later iteration is checked in. Samples of RDA pcc cataloging have turned up Latest issue consulted notes, however (use of "issue" instead of *iteration* or *version* also seems questionable). As with serials, enter the DBO note as the last note (other than 590).

Some complex examples from the unrevised CONSER Module:

a. Base volume (t.p. has 2001):

26 | | | ‡a ____ : ‡b ____ , ‡c 2001-
4

b. Base volume with t.p. c2001 date with separate packets of updates #1-#2 carrying 2002 dates.

26 | | | ‡a ____ : ‡b ____ , ‡c [2001]-
4

58 | | | ‡a Description based on: update #2, published 2002.
8

c. Base volume with t.p. 2000 date with separate packets of updates #1-#5 already interfiled; footer on #5 has c2000; preface says resource "first published in 1999":

26 | | | ‡a ____ : ‡b ____ , ‡c [1999]-
4

58 | | | ‡a Description based on: update #5, copyrighted 2000.
8

10. **RDA 3.4.1.10 Incomplete Resource.** Nothing explicit, but one of the examples uses *volumes (loose-leaf)*.

- Use "volumes (loose-leaf)" in 300 ‡a until the resource is complete

Updating Loose-leaves Checklist

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- Record transfer volumes (**LC-PCC PS 3.4.1.10**)
as:
volumes (loose-leaf), volume (transfer)

11. **RDA 2.14.1.3 Recording Frequency.** "Record the frequency ... of updates to an integrating resource if known." There is a list of controlled terms that should be used given at 2.14.1.3.

Under AACR2, the standard practice was to include the word "updated" or "updates" with the frequency word to clarify that the resource itself does not have that frequency (e.g., "Updated quarterly," "Monthly updates"). This hasn't been stated explicitly in the current LC-PCC PS, but seems to be a practice that should be continued [but see Example 2: 310 field]. As with serials, frequency is recorded in MARC 310 (no period at the end of the field).

310			‡a Updated monthly
-----	--	--	--------------------

If none of the terms under 2.14.1.3 is appropriate, the cataloger is referred to **RDA 2.17.12.3 Details of Frequency of Updating or Currency of Contents.**

RDA example:

310			‡a Revised edition issued every 4 months
-----	--	--	--

LCCN 2014200394 (for an online integrating resource, but could be applied to an updating loose-leaf)

310			‡a Monthly updates and newsletter
-----	--	--	-----------------------------------

12. **336-338.** Use RDA terms applied to printed texts. Subfield b is optional.

336			‡a text ‡b txt ‡2 rdacontent
-----	--	--	------------------------------

337			‡a unmediated ‡b n ‡2 rdamedia
-----	--	--	--------------------------------

338			‡a volume ‡b nc ‡2 rdacarrier
-----	--	--	-------------------------------

13. **Accompanying Material.** Although updates to MARC now allow for multiple 300s to describe accompanying material, with updating loose-leaves, information about accompanying material may be too complex to express in a second 300, so a note would be preferable.

Examples from IR:CM.

500			‡a CD-ROM with last update for the year.
-----	--	--	--

500			‡a Accompanied by supplementary pamphlets and by unnumbered newsletter volume.
-----	--	--	--

14. **530 vs 776.** Use 776 in preference to 530.

Example from IR:CM

776	0	8	‡i Issued also as an online database: ‡t USDA national nutrient database for standard reference ‡w ...
-----	---	---	--

15. **Indexes.** For updating loose-leaves, indexes can be important. Make a note when in doubt.

Example from IR:CM

500			‡a Indexes supplied with every 10th update.
-----	--	--	---

Linking Relationships (MARC fields)

List of relationships:

- Continuation
- Merger
- Split
- Absorption
- Translation
- Simultaneous edition
- Supplement

MARC21 Relationship tags. These tags have been used up till now only for serials. They are now used instead of the 500 note for updating loose-leaves in these situations:

780/785	Preceding/ Succeeding : • Con tinu atio n • Mer ger • Split • Abs orpti on
765/767	Translation of/Translated as
770/772	Supplement/Parent record
775	Other edition available
787	Nonspecific relationship

Note: no end punctuation in 7XX unless the field ends with an abbreviation, etc.

MARC21 580 (Linking entry complexity note):

- When note cannot be generated from the linking fields
- When a linking field isn't present

Common situations: cataloger knows another language edition exists but doesn't know the exact title; 7xx can't be used.

58		‡a Translated from the Russian.
0		

580 may have to be used in situations where the webpac cannot generate understandable labels from the 7xx indicators (x merges with y to form z).

MARC21 580 in relation to 7xx indicators.

- Indicator "0" = Display note from field
- Indicator "1" = Do not display note from field
- If 580 field is not in the record, indicator is "0"
- If 580 field is in the record, indicator is "1"

7XX 2nd indicator generates a display constant. Examples:

Updating Loose-leafs Checklist

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780 x0 = CONTINUES

780 x4 = MERGER OF

785 x0 = CONTINUED BY

785 x4 = MERGED WITH ... TO FORM ...

765 x_ = TRANSLATION OF

In 7XX, use the main entry used in the catalog.

In the examples, other title information and statement of responsibility are omitted. The examples are serials for the most part.

Expression relationship. Earlier title.

110	2		‡a Norges teknisk-naturvitenskapelige forskningsr_ad.
240	1	0	‡a Arsberetning. ‡l English
245	1	0	‡a Annual report.

Linking field on the record for the later title:

780	0	0	‡a Norges teknisk-naturvitenskapelige forskningsr_ad. ‡s Arsberetnin. English. ‡t Annual report.
-----	---	---	--

Earlier title:

130		0	‡a Hong qi. ‡l English.
245	1	0	‡a China report. ‡p Red flag.

Linking field on the record for the later title:

780	0	0	‡t Hong qi. English. China report. Red flag.
-----	---	---	--

Linking fields: subfields. 780/785, 765/767, 770/772, 775:

‡a = Main entry heading

‡s = Uniform title

‡t = Title

‡b = Edition

‡x = ISSN

‡z = ISBN

‡w - Record control number (LCCN)

Form of linking entry:

Title proper and, if needed, edition	245 245/250	‡t ‡t ‡b
Main entry name heading/title proper, and, if needed, edition	1XX/245 1XX/245/250	‡a ‡t ‡a ‡t ‡b
Main entry name heading/uniform title	1XX/240	‡a ‡s
Main entry name heading/uniform title/title proper (legal works, translations)	1XX/240/245	‡a ‡s ‡t
Main entry uniform title	130	‡t
Main entry uniform title/title proper (translations and other language editions)	130/245	‡t

Linking notes conventions:

- Punctuation: ending periods only in ‡a and in ‡s -- in ‡t if followed by ‡b.
- Subfielding: no internal subfielding in ‡a or ‡t.
 - ‡a Surname, Initial (Forename), Date-
 - ‡a Parent body. Subordinate body. ‡t Common title. Section title
- Initial articles: omit all unless filing on any one.

Updating Loose-leaves Checklist

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In the following example, a record for a new edition is created because it consists of a new base volume called "Second edition." Database search indicates that the first edition had the same main entry and title proper. The earlier edition is not recataloged to RDA form and the link text accepts the descriptive rules used by the earlier edition.

NEW EDITION:

010			‡a 2002046534
020			‡a 0179852641 (loose-leaf)
100	1		‡a Allan, Wallace, ‡d 1950- ‡e author.
245	1	0	‡a Regulations. ‡p Loans.
250			‡a Second edition.
780	0	0	‡a Allan, Wallace, 1950- ‡t Regulations. Loans. ‡b 1st ed. ‡z 0165247719 ‡w (DLC)###97109851

EARLIER EDITION:

010			‡a 97109851
020			‡a 0165247719 (loose-leaf)
100	1		‡a Allan, Wallace, ‡d 1950-
245	1	0	‡a Regulations. ‡p Loans.
250			‡a 1st ed.
780	0	0	‡a Allan, Wallace, 1950- ‡t Regulations. Loans. ‡b Second edition ‡z 0165247719 ‡z 0179852641 ‡w (DLC)###2002046534

EXAMPLE OF 580 used for complex relationship. Note that the 780/785 2nd indicator is 1, since the 780 field is not intended for display. (In the examples, each "#" represents one blank space.)

NEW TITLE:

010			‡a 2002111111
022			‡a 1234-5678
245	0	0	‡a Regulations for commercial and residential property.
580			‡a Merger of: Regulations for commercial property, and: Regulations for residential property
780	1	4	‡t Regulations for commercial property ‡z 1212343456 ‡w (DLC)###95012012
780	1	4	‡t Regulations for residential property ‡z 0101252252 ‡w (DLC)###96214789

EARLIER TITLE (1)

010			‡a 95012012
022			‡a 1212343456 (loose-leaf)
245	0	0	‡a Regulations for commercial property.
580			‡a Merged with: Regulations for residential property, to form: Regulations for commercial and residential property
785	1	7	‡t Regulations for residential property ‡z 0101252252 ‡w (DLC)###96214789
785	1	7	‡t Regulations for commercial and residential property ‡x 1234-5678 ‡w (DLC)###2002111111

EARLIER TITLE (2)

010			‡a 96214789
022			‡a 0101252252 (loose-leaf)
245	0	0	‡a Regulations for residential property.
580			‡a Merged with: Regulations for commercial property, to form: Regulations for commercial and residential property
785	1	7	‡t Regulations for commercial property ‡z 1212343456 ‡w (DLC)###95012012
785	1	7	‡t Regulations for commercial and residential property ‡x 1234-5678 ‡w (DLC)###2002111111

Fixed Fields

MARC21 LEADER Bibliographic Level. Use code "i" for integrating resource. Prior to the MARC update in 2003, both serials and integrating resources were assigned "s."

MARC21 006.

Prior to 2003, a 006 field was made in order to identify the resource as integrating, since the Leader Bibliographic Level only had "s" for serials. The fixed field codes for integrating resource formerly used in 006 should now be entered in 008; no 006 is made.

MARC21 008:

TYPE OF CONTINUING RESOURCE is always "l" (L) (=Updating loose-leaf)

TYPE OF ENTRY: Use 2 [Integrated Entry]

If 310 is not present, leave the **FREQUENCY** blank. This should be the default. If 310 is present, then use the most appropriate code.

Note that FREQUENCY code "k" (continuously updated) is intended for websites, not updating loose-leaves.

Updating (Maintenance)

Updating a Preexisting record. Basic Principles

A. Re-do the description to match the current iteration

B. Give earlier information in a note:

- Give note for earlier title (247)
- Give note for other data elements if considered to be important

C. Give access points for earlier information if appropriate.

D. Consider if main entry needs to be revised.

RDA 1.10.5. Identify iteration if note does not apply to all iterations.

- Give exact information if readily available.
- Otherwise, use information in "Description based on" note of record before it was revised; give information in angle brackets.

RDA 2.3.2.12.3. Change title area to reflect current iteration. Give earlier title proper in a note. LC practice is to make only a "500 Title varies slightly" note if the change is at the end of a long title and access is not affected.

MARC 247:

- Indicators: 10
- Earlier title proper = subfields ‡a, ‡n, ‡p
- Identification of earlier iteration = subfield ‡f
- ISSN or earlier title proper = ‡x

MARC 547 Former title complexity note generally is not used for updating loose-leaves but may be used for online integrating resources where reformatting has removed all references to the earlier title. **See LC PCC PS 2.3.7.3.**

Updating Loose-leafs Checklist

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IR:CM:

"When the current iteration has a different title, change the title proper and statement of responsibility area in the bibliographic record to reflect that iteration. It is important to retain the information regarding the title proper of the earlier iteration. Give the former title in a 247 field; this field generates both a note and an added entry. Give the update designation or date of earlier iteration in ‡f; if there was an ISSN for the earlier iteration, move it from the 022 field to ‡x of the 247 field. The 247 field is repeatable; if the title proper changes again on a subsequent iteration, update the 245 field again and move the previous title proper to an additional 247 field. Give the 247 fields in order from earliest to most recent."--Page 62.

Use 247 only for changes in title proper. Use 246 for changes in other title, parallel titles, etc.

"In ‡f of the 247 field, indicate the range of dates of the former title proper if that information is available. When that information isn't available (the most common situation), use the date or designation in the item described note for the earlier iteration and enclose it in angle brackets (i.e., < >). If the title proper changes again, update the 245 field and give the former title proper in a second 247 field."--Page 40.

MARC 588. When updating, if the record for the earlier iteration used 500 for the DBO note, replace it with 588. The 588 should be the last note before 590, if the unit practice places 590 at the end of the notes sequence. See example.

EXAMPLE

RECORD PRIOR TO UPDATE:

022			‡a 2232-4543	
245	0	0	‡a Dental hygienists : ‡b current guidelines.	
588			‡a Description based on: release 2, published 2000.	

RECORD AFTER UPDATE:

022			‡a 2343-7896	
245	0	0	‡a Dental hygienists' guidelines	
247	1	0	‡a Dental hygienists ‡f <release 2, published 2000> ‡x 2232-4543	
588			‡a Description based on: release 7, published 2002.	

UPDATING BEYOND THE TITLE PROPER

RDA 2.3.3.5.3 ANY change in parallel title. Update to reflect current iteration. Make a 246 ‡i ‡a note if considered to be important. In ‡i, identify the iteration.

RDA 2.3.4.7.3. If an Other Title (245 ‡b) appears on a later iteration, or the Other Title changes in a later iteration, record it if considered to be important for identification or access. If the other title change is not considered important for identification or access, delete it. If the decision is to transcribe the other title, the current iteration must be reflected. If considered to be important for access, treat the earlier other titles or deleted other titles as variant titles. Use the 246 field ‡i and ‡a; identify the current iteration in ‡i.

RDA 2.3.6.3. Changes in other titles (e.g. added title page, cover) on the resource. If considered important for identification and retrieval, combine a note with the former title in 246 1_. Use subfields ‡a and ‡i; include the identification of the iteration in ‡i.

RECORD PRIOR TO UPDATE:

245	0	0	‡a Scholarship opportunities for future math teachers.	
246	1		‡a Math education scholarships	
588			‡a Description based on: release 5, published 1999.	

RECORD AFTER UPDATE:

245	0	0	‡a Future math teachers' scholarship opportunities.	
246	1		‡i Added title page title <release 5, published 1999>: ‡a Math education scholarships	
247	1	0	‡a Scholarship opportunities for future math teachers ‡f <release 5, published 1999>	

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588			‡a Description based on: release 9, published 2001.
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RDA 2.4.1.10.3. Statement of responsibility. Revise the record if necessary to reflect current iteration. If considered to be important, make a note about the earlier statement of responsibility. If statement of responsibility changes, this may affect the identification of the primary creator. RDA does not specify, but a general note may be used if the changes have been numerous, i.e.

50			‡a Editor varies.
----	--	--	-------------------

Use 500 also if specific editors are named, but use 550 for issuing bodies:

55		4	‡a Issued by Institute QRS, < -update 1999-4 >; by Association LMN, <update 2000-6>
----	--	---	---

RDA 2.5.1.6.3 Changes in edition area. Assumption is that a new record is not required (no new base volume). In that case, 250 must be updated to reflect the current iteration. If the edition information changes often, there is an option not to record it at all and make a general note instead RDA 2.17.4.5.3.

LC PCC PS 2.17.4.5.3 for a gradual replacement edition (i.e. no new base volume), make a note about the new edition statement.

25			‡a Second edition.
----	--	--	--------------------

50			‡a Updated to Second edition, June 2001.
----	--	--	--

RDA 2.8.1.5.3 ANY change in the publication statement. Record must reflect the current iteration; give a note if the earlier information is important. Alternative: general note may be given if the changes are too numerous. Don't forget to update 008 if necessary.

RDA 2.8.6.5 Ending date. If the updating loose-leaf is finite and the last iteration is in hand, update the description if there have been any changes; don't forget to update 008 date 2.

- If the date of the first iteration has been recorded, and the date of the last iteration is available, add the date of the last iteration in 264 _1 ‡c; supply the date of the last update if considered to be important: 1995-1998 [updated 1999]*
- If the last iteration is available but the first iteration was not recorded, record the date of the last iteration: -1987.
- If the last iteration is not available but information about the ending date is known, supply an approximate date: 1997-[2000]
- If the date cannot be approximated, then don't record a date.

*This situation occurs when the last replacement iteration does not include a replacement title page.

26		1	‡a ___ ‡b ___ ‡c 1996-2001 [updated 2002]
----	--	---	---

RDA 3.4.1.10 (Incomplete Resource). Extent of item for textual integrating resources, i.e. loose-leaves. Precede the specific material designation in 300 ‡a by the number of parts when the last iteration is received; otherwise, do not enter the number of held volumes. Current practice is to record number of parts only when the set is complete. Formerly, the number of currently received volumes was recorded in angle brackets in LC practice; remove when performing copy cataloging.

30			‡a 3 volumes (loose-leaf)
----	--	--	---------------------------

RDA 3.5.1.8.2. If the dimensions change, update to the current iteration; make a note if the change is considered to be important (do not give dimensions as a range, as you would for a serial or multipart monograph).

RDA 2.14.1.4, 2.17.12.4. If frequency of updates changes:

- Change the existing 310 field to 321 (former frequency).
- Add a new 310 field to reflect the current iteration.
- Update Frequency in 008
- Give the identification of the iteration in subfield ‡b:

31			‡a ‡a Updated monthly, ‡b <release 2002-1>
----	--	--	--

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0			
31			‡a Updated quarterly ‡b release 2012-
0			
321			‡a Updated monthly, ‡b <release 2002-1>-release 2012

RDA 3.1.6.2. If the media type changes (337), make a new record. If the carrier type changes (338) or the characteristics of the original carrier change, revise the carrier description to reflect the current iteration. Make a note if considered to be important. Update the 008 if necessary.

RDA 2.12.1.6.2. Change the series statement to reflect the current iteration whether a series has been added, deleted, or changed. **RDA 2.17.11.5.2** If an earlier series no longer appears on the current iteration, make a note; if a series statement appears on a later iteration, make a note to record the publishing date of that iteration.

Under **LC PCC PS 25.0 Authorized Access Points for Series**, note that the PS does not apply to LC practice, since LC no longer traces series. The PS applies to PCC libraries that decide to trace. The examples are from the PS (they are carried over for the most part from the LCRI 21.30L). One change (& slight deviation from RDA) is that the series statement for the earlier series is recorded in 490 rather than 500. There is another example in PS 25.0 for a series that no longer appears on the current iteration: it is entered in 490 rather than as a note.

RECORD PRIOR TO UPDATE:

264		1	‡a Denver : ‡b Smith Publishing Company
490		1	‡a Research in library acquisitions
588			‡a Description based on: update 2, published in 1991.
830		0	‡a Research in library acquisitions.

RECORD AFTER UPDATE:

264			‡a Denver : ‡b Smith Publishing Company
490		1	‡3 <2000>: ‡a Library acquisitions
490		1	‡a Series title <1991>: Research in library acquisitions
588			‡a Description based on: update 9, published in 2000.
830		0	‡a Research in library acquisitions.
830		0	‡a Library acquisitions (Denver, Colo.)

Notes.

Integrating Resources: a Cataloging Manual. "If the updating loose-leaf consisted of both numbered and unnumbered volumes, and the total number of volumes is recorded in the physical description area, make a note to record the details of unnumbered volume(s) if that information is considered important."--Page 68. Instead of 500, the note could be entered in 246 if the title of the unnumbered volume is considered to be important for retrieval. However, for some components of law publications, the information should only be recorded in notes. See **LC PCC PS 25.1.1.3 Authorized Access Points for Component Parts of Compilations of Laws.**

500			‡a Includes unnumbered volume: European Union law update.
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Change in Title Proper and Access/Linking Fields:

- If the title proper being moved to the 247 field was in a 580/7XX linking field in another record, update the link in that other record
- If the title proper being moved to the 247 field was in a 6XX/7XX in another record, update the field in that other record

Subject Headings

If changes in later iteration have so changed the overall content of the resource that the subject headings in the record are no longer the most appropriate headings; if so, update subject headings, but do not reclassify.

Example 1. National aerospace standards

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New description created because of publisher change; title remains the same.

Leader:

Label	Code	Note
Type of Record	a	Language material
Bibliographic Level	i	Integrating Resource
Encoding Level	_	Full Level
Cataloging Form	i	ISBD Punctuation Included

008

Leader	Code	Note
Publication Status	c	Serial Item Currently Published
Date 1	2014	
Date 2	9999	
Place of Publication	cou	Colorado
Frequency	u	Unknown
Regularity	u	Unknown
Type of Continuing Resource	l ["L"]	Updating loose-leaf
Original Item	_	None of the following
Form of Item	_	None of the following
Nature of Entire Work	_	Not specified
Nature of Contents 1-3		Not specified
Govt Publication	_	Not a govt publication
Conf Publication	_	Not a conf publication
Entry Convention	2	Integrated Entry
Language	eng	English
Modified Record	_	Not modified
Cataloging Source		Cooperative Cataloging Programs

No 006

No 007

Variable Text Fields

A case could be made for entering the Aerospace Industry Association of America in 110 since the standards appear to originate from that body. A new record was probably made because the resource was re-based when it changed publisher, but if the originator of the standards undergoes a name change or changes, entry would be under the current name based on the current iteration.

010			‡a 2014242346
040			‡a MCM ‡b eng ‡e rda ‡c MCM ‡d MCM
042			pcc
130	0		‡a National aerospace standards (Englewood, Colo.)
245	0	0	‡a National aerospace

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			standards.
246	1		‡i Also called: ‡a NAS
264		1	‡a [Englewood, Colorado] : ‡b IHS Inc., ‡c [2014]-
300			‡a volumes (loose-leaf) : ‡b illustrations ; ‡c 28 cm
336			‡a text ‡b txt ‡2 rdacontent
337			‡a unmediated ‡b n ‡2 rdamedia
338			‡a volume ‡b nc ‡2 rdacarrier
500			‡a Loose-leaf for updating.
520			‡a Contains standards issued by the Aerospace Industry Association from 1941 to the present.
588			‡a Description based on 2014, volume 1; title from title page.
650		0	‡a Airplanes ‡x Standards.
650		0	‡a Space vehicles ‡x Standards.
710	2		‡a Aerospace Industry Association of America.
780	0	2	‡t National aerospace standards ‡w (OCoLC)25313202
787	0	8	‡i Index (work): ‡t Index to National aerospace standards (Englewood, Colo.) ‡w (DLC)sn 95037073 ‡w (OCoLC)29789603

Example 2. Self-insured health plans (NSDP Minimal)

Leader & 008. See Example 1.

Variable Fields (Textual)

010			‡a 2013200823
022	0		‡a 2328-0107 (loose-leaf) <added qualifier>
040			‡a ICNGE ‡b eng ‡e rda ‡c ICNGE ‡d DLC ‡d OCoLC
042			‡a pcc ‡a nsdp

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222			‡a Self-insured health plans <only NSDP is authorized to add 222>
245	0	0	‡a Self-insured health plans / ‡c Aline G. Haffner., contributing author and editor [and others].
246	1		‡a EBIA self-insured health plans <replaced with standard BSR indicators>
264		1	‡a Edmonds, WA : ‡b Thomson Reuters/EBIA, ‡c [2012]- <re-located copyright date>
264		4	‡c ©2012 <optional; during the test period in 2012 copyright date was required>
300			‡a volumes (loose-leaf) <NSDP/CONSER do not require dimensions; YUL local policy requires>
310			‡a Quarterly
336			‡a text ‡b txt ‡2 rdacontent <‡b is optional for 336-338>
337			‡a unmediated ‡b n ‡2 rdamedia
338			‡a volume ‡b nc ‡2 rdacarrier
362	1		‡a Began with: 3rd Qtr. 2012.
500			‡a Includes index.
588			‡a Description based on: 3rd Qtr. 2012 (surrogate).
588			‡a Latest issue consulted: 4th Qtr. 2012 (surrogate). <probably superfluous>
650		0	‡a Health insurance ‡x Self-insurance ‡z United States.
710	2		‡a Employee Benefits Institute of America, ‡e issuing body. <added relationship designator>

Source URL: <https://web.library.yale.edu/cataloging/loose-leaves>

Links

[1] <http://www.loc.gov/aba/pcc/bibco/documents/irman.pdf>

