

JULAC Bibliographic Services Committee General Guidelines for Shared Cataloguing

1.0. Standards

On a date agreed by all JULAC libraries (i.e. Day 1), all JULAC Libraries will follow international standards and guidelines described in this document in contributing newly created original catalogue records to the shared ILS. Bibliographic records created by JULAC libraries before Day 1 will not be converted retrospectively to the new standards. They will be converted when time and resources are available.

In order to facilitate future merging of catalogue records and to avoid double-handling of records, the exact date of Day 1 may be before the full implementation of the shared ILS if agreed by all JULAC libraries.

1.1. General

From 1.1 to 2.2, please refer to "General References" for resource links.

The preferred standards for creating original bibliographic records are as follows:

1.1.1. MARC 21 format for Bibliographic Data

1.1.2. RDA (Resource Description and Access)

1.1.3. OCLC Bibliographic formats and standards

1.1.4. Library of Congress-Program for Cooperative Cataloging Policy Statements (LC-PCC PSs)

1.1.5. Library of Congress Subject Headings

1.1.6. Library of Congress. List of the Subject Headings Manual PDF Files

1.1.7. PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile

1.2. Continuing Resources

Preferred standards for creating original bibliographic records for continuing resources:

1.2.1. CONSER Cataloging Manual

1.2.2. CONSER Editing Guide

1.2.3. CONSER Standard Record (CSR) Documentation

1.2.4. CONSER RDA Core Elements

1.2.5. CONSER MARC-TO-RDA Core Elements

1.2.6. CONSER RDA Core Cataloging Checklist

If there are discrepancies among RDA, Marc21 and CONSER, JULAC libraries will follow CONSER's guidelines.

1.3. Electronic Resources

Preferred standards for creating original bibliographic records for e-resources:

1.3.1. Program for Cooperative Cataloging (PCC) Provider-Neutral E-Resource MARC Record Guidelines

1.3.2. Best Practice for Cataloging Streaming Media

See: OLAC Best Practices for Cataloging DVD-Video and Blu-ray Discs, Objects, Streaming Media and Video Games Using the Original RDA Toolkit and MARC 21 (version 1.1 October 2023)

1.4. Audio-visual Materials

Preferred standards for creating original bibliographic records for audio-visual materials:

1.4.1. Best practices for cataloging DVD-video and Blu-ray discs: using RDA and MARC 21

See: OLAC Best Practices for Cataloging DVD-Video and Blu-ray Discs, Objects, Streaming Media and Video Games Using the Original RDA Toolkit and MARC 21 (version 1.1 October 2023)

1.5. Music

Preferred standards for creating original bibliographic records for print music and musical sound recordings:

1.5.1. Bibliographic Control Committee (MLA). Best practices for music cataloging using RDA and MARC21

If there are discrepancies among RDA, Marc21 and guidelines from OLAC, JULAC libraries will follow OLAC's guidelines.

2.0. Levels of Details in Cataloguing

2.1. Core Level

Core Level should be applied for all original bibliographic records created by JULAC libraries. LC's core elements should be followed.

[Note: LC implemented relationship designators to all creators (i.e. MARC 1XX and 7XX) from 1 July 2015 onward.]

2.2. PCC Guidelines for the Application of Relationship Designators in Bibliographic Records

3.0. Monographic Records - Specific Guidelines

Standardization for specific fields:

	Elements	Specific Guidelines	Remarks
1.	Leader/17 Encoding level [updated Jan 2025]	All original records uploaded to the shared ILS should be catalogued in full level. i.e. use [blank] for full level	
2.	006/007	Additional 006 and/or 007 field for monographs with accompanying materials in other formats.	
3.	008/22 Target audience	Optional to leave blank or enter MARC definitions of codes. Local codes are not allowed.	If use, must follow Optional practice
4.	008/28 Government publication	<ul style="list-style-type: none">• Compulsory for Hong Kong Government publications• Optional for non-Hong Kong government publications	
5.	008/33 Literary form	<ul style="list-style-type: none">• 0 for non-fiction• 1 for fiction	
6.	020 ISBN	<ul style="list-style-type: none">• Use \$q for qualifying information• Enclose information in \$q in brackets• Other format's ISBN should be put in \$z or 776\$z	

	Elements	Specific Guidelines	Remarks
7.	040 Cataloging source	<ul style="list-style-type: none"> • XXX\$beng\$erda\$cXXX • Only \$beng can be added to the shared ILS 	
8.	245 \$a & \$b	<ul style="list-style-type: none"> • Apply the Capitalization guideline (RDA Appendix A) instead of transcribing directly from the title page 	
9.	245 \$c	<ul style="list-style-type: none"> • Transcribe up to 3 authors • If there are more than 3 authors, transcribe only the 1st and indicate the omission by summarizing what has been omitted in square brackets, e.g., [and 1 other], [and 4 others] (see RDA 2.4.1.5 Optional Omission) • Optional to transcribe affiliation, qualification and title • Should there be any members from the 8 institutions of JULAC be identified, their names should be transcribed regardless of their order of appearance 	
10.	250	Repeatable only for separate edition statements found in different locations of the source.	
11.	264 #4	Require only if it is different from 264 #1 \$c	
12.	300	Use 300\$e for accompanying materials	
13.	336/337/338	\$a, \$b and \$2	
14.	59X	All local notes should be put in 59X	

	Elements	Specific Guidelines	Remarks
15.	651 #4	<p>Use 651 #4 for parallel Chinese place names within China, Taiwan, Hong Kong & Macau. Also, pair the qualifiers China, Taiwan, Hong Kong & Macau with 中國, 臺灣, 香港, 澳門 respectively.</p> <p>For example,</p> <p>651 _4 a 沙田 (中國) _0 a Sha Tin (China)</p> <p>651 _4 a 沙頭角 (香港, 中國) _0 a Shatoujiao (Hong Kong, China)</p> <p>651 _4 a 臺東縣 (臺灣) _0 a Taitung County (Taiwan)</p>	<p>Optional practice</p> <p>When that option is exercised, it should be done according to PCC guidelines for non-Latin data.</p> <p>References:</p> <ul style="list-style-type: none"> • PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets • H 0182 Chinese/Japanese/Korean Subject Headings (from LC. List of the Subject Headings Manual PDF Files)
16.	655	Genre/form terms	Optional practice
17.	69x	<p>Use 69x for non-LC established subject headings, <u>not</u> 65x second indicator 4.</p> <p>For example,</p> <p>69x __ a 沙田 (香港, 中國) 69x __ a Sha Tin (Hong Kong, China)</p>	Optional practice
17.	775/776	Guidelines for applying 775/776 will be further developed.	
18.	1XX, 7XX\$e	If it is able to identify, apply relationship designators, e.g. author, editor, translator, illustrator, compiler, publisher, issuing body, etc.	
19.	830	Remove \$x (ISSN) when sharing records to NZ	

4.1. Adoption of MARC 880s for CJK Records

There are three possible options: a) all libraries to adopt MARC 880s; b) all libraries not to adopt MARC 880s; and c) maintain existing practice, i.e. each library can decide to adopt MARC 880s or not.

While option c) will have less impact on individual libraries, a non-standardized practice may create inequality in future collaboration on shared cataloguing as libraries adopting 880s will require extra workload on upgrading records from libraries not adopting 880s. Since all three options may have significant impacts on individual libraries as well as future shared cataloguing, advice should be sought from JULAC Directors on whether all CJK records should be transliterated if they are added to the shared ILS.

Update: Option a adopted.

4.2. Standardization of Transliterations

If transliterations in MARC 880s are adopted, standardization in practice will be required. Further study is needed for, e.g.:

4.2.1. Whether *PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets* should be followed strictly;

<http://www.loc.gov/aba/pcc/bibco/documents/PCCNonLatinGuidelines.pdf>

4.2.2. Or adopting other alternatives, such as providing linking fields for Chinese personal and corporate names, and geographical names for China and Hong Kong containing pinyin in topical subject headings.

Update: Option 4.2.1 adopted.

5.0. Electronic Package Name

5.1. Members are using different MARC tags (e.g. 773, 730) as local practices. These practices do not follow the Provider Neutral guidelines. Further discussions are needed on this issue and whether there is need to assign specific local fields (e.g. 793) and have the fields indexed.

Update: MARC 925 is used for electronic package title in NZ.

Link to the full title list in JULAC intranet: [NZ local fields \(9xx fields\) / 925 field/035 prefix](#)

6.0. Works with Various Combinations of Parts

6.1. Textbooks: Textbooks may not be ordered in complete set in one time. Textbooks with various combinations of parts should be catalogued as one single work even if the library does not acquire the whole set. Add 59x field if the library lacked a part or some parts. Catalogue different parts of a textbook separately only if the parts were not published at the same time (e.g. solutions to a textbook).

7.0. AI-Generated Metadata [added Feb 2026]

7.1. Data provenance of AI-generated metadata

Following guidelines from PCC and OCLC, any unreviewed AI-generated metadata included in a bibliographic record should be marked using the following methods:

Using a 588 note at record level

Examples (from OCLC):

588 0_\$a Contents note generated by AI on May 21, 2024

588 0_\$a Some metadata was created with assistance of ChatGPT4 on June 10, 2024

588 0_\$a Part of the metadata in this record was created with the help of AI Metadata

Exact wordings can be determined by individual library.

*The 588 note can be repeated for other purposes.

Specific field subfields

Adding \$7 AI-generated to a field whenever applicable and feasible

Examples:

6xx \$7AI-generated

520 \$7 AI-generated

Once the metadata has been reviewed, it is not required to add the above fields and subfields to mark the data provenance of the metadata in a bibliographic record.

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