

2019-08-14 VAOH Session

Presentation summary

Shanna Griffith and Robin Six presented on the topic OCLC Cataloging Policies: An Overview of Bibliographic Format and Standards. They explain this guide to coding practices and input standards and how MARC is applied to WorldCat.

URLs mentioned during the presentation:

- Home page for all OCLC Support: <https://help.oclc.org/>
- OCLC BibChange: BibChange@OCLC.org
- Hahn macro library <http://www.hahnlibrary.net/libraries/oml/connex.html>

Member questions

I'm not familiar with the "Functions" column in a Connexion record that was shown in the demonstration.

Answer: Going back to the slide of the Connexion browser, over on the right you can see a “functions” drop down menu. You can access help from that menu. You can also select to add multiple fields or copy a particular field.

How do I know when a page in BFAS has been updated?

Answer: There is a date at the bottom of each page that shows when the page was revised in some way. It may be to just fix a typo, add more information or completely revise the whole page.

Does BFAS indicate if/when OCLC will remove a field through its QA processes?

Answer: Once obsolete fields have been removed from WorldCat, the same information will eventually be removed from Bibliographic Format and Standards (BFAS).

Could you talk a little bit about where (if?) BFAS differs from MARC21 Format for Bibliographic Data (<https://www.loc.gov/marc/bibliographic/>) and if there are differences, how decisions are made to diverge from MARC21.

Answer: We try to follow MARC 21 as closely as possible. If OCLC has added something in advance that is specifically OCLC defined in the past, we reconsider the element and decide whether we should get rid of it. In some cases we have implemented content designation in advance of MARC 21, or if it comes to be the case that MARC 21 now has a field or subfield available to record the same kind of information, we might get rid of this to be in line with the MARC 21 standard. As part of that, we would convert data in the database or possibly eliminate it to take the obsolete field out of the validation and out of the BFAS documentation.

Often, our librarians print out a document found on the internet and want it added to our collection. Would we use the section 3.1.2 and treat similar to a photocopy?

Answer: Yes, chapter 3.1.2 says “A photocopy or POD reproduction may be made in-house, or it may be ordered from a photocopy or POD service provider. The source of a photocopy or POD reproduction may itself be a reproduction.” Read the OCLC policy that follows this definition and treat as an on-demand publication.

Should we be reporting all the level M duplicate records? Is an ISBN that brings up multiple records enough?

Answer: Absolutely. Report any records you feel are duplicates in any way that is convenient to you.

I am a new cataloger, and wonder if Connexion browser is still available if our institution only pays for CatExpress ?

Please reach out to Support@oclc.org and they will be able to help you.

I see there will be a November session comparing Connexion to Record Manager. Is this an indication we should be learning Record Manager if we currently only use Connexion?

Answer: It would not hurt to learn to use Record Manager, but no, this is not an indication you should be learning Record Manager. There is no end-of-life date for Connexion yet, but if/when there is, there will be plenty of notice for everyone to make the transition.

Could you say something about Encoding levels (Elvl), recently I edited the record with Elvl 1 and cleaned it up and I did not change the Elvl, but i think that I should have changed it.

Answer: It sounds like the question is about upgrading a record. The information that you can provide and the types of changes that you are able to make to records can be found in BFAS Chapter 5, Member Capabilities.

Could you talk a little bit on reporting an error, for example for field 505?

Answer: How to report errors is covered in BFAS Chapter 5.5, Requesting Changes to Records. This also includes the reporting methods available.

Any chance that OCLC staff, perhaps some from QC, might begin similar standards for KBart Metadata. With budgets moving from individual print books to purchasing collections of eBooks, quality control for KBart data is needed. It feels like there need to be a partial shift of resources towards the quality of collection metadata. Any comments?

Answer: There is a session coming up on Knowledge base quality that should address this question. We will be sure the person giving the session will be given this question because it may help with their presentation.

Should we report information missing in the 300 field, such as illustrations, and the pages in 504?

Answer: We do get a lot of requests for this. If this is an edit you are unable to make, but it is important to you, please send it to BibChange@oclc.org.

Re: FAST headings: If we add, delete or change LCSH in a bib record, we should delete existing FAST headings, is this correct?

Answer: Yes, if you delete these because they are inappropriate or incorrect, they should get regenerated correctly. If you are adding another additional LCSH headings, then we will go ahead and add the new fast heading at a later date.

I find that BFAS has better examples than MARC21 under each MARC field. The examples in BFAS are broken out by subfield (i.e. you can find examples for every subfield). It's also easier to see the correct punctuation between various subfields.

Comment: Thank you, we worked very hard on that. We try to provide as many examples as possible (and stewed over the examples in some cases to illustrate as many situations and subfields as we could). If you happen to come across any good examples that are not already exemplified in BFAS, you are welcome to send them to us to help provide better explanations.

At one time, I seem to recall hearing something about Connexion changing to a web-based interface. Are there currently any plans to do this?

Answer: We do have the Connexion browser interface that is web-based and Record Manager WMS is web-based. Only the Connexion client is a desktop application. If you would like to try Record Manager, you can sign up for an OCLC Services account, see what you think of it.

Does OCLC have any plans for additional vocabularies for the control headings function, in particular the Getty Art and Architecture Thesaurus?

Answer: Heading control functionality is added with new authority files, but that functionality exists only in Record Manager rather than in Connexion. I believe that Getty Art and Architecture Thesaurus is one that is on the schedule to provide the control functionality.

How do I report errors in the text of BFAS?

Answer: Send error reports to askqc@oclc.org. But of, course, there are no errors in BFAS!

Record manager doesn't have macro capability for record clean-up yet, does it?

Answer: Not yet, but they are working on bulk edit for local records, but not yet on master records. However, there are some advanced actions available in Record manager, such as deriving an electronic record from a print record.

In RM, the bulk edit for LBD and LHR (pilot) uses scripts, not macros. The LHR pilot will run from end of Aug to Sept.

Why do some subject headings in the authority file not control when added to the record? Example: Imaginary creatures \$v Fiction.

Answer: That may have something to do with the type of authority record it is.

Most often the case is explained in the 667 field, which may say "Record generated for validation purposes" and is generated off the LC bibliographic file as opposed to intentionally put into the subject authority file. Many are machine generated and are not used in the controlling process because many consists of a topic and a free floating subdivision for which there are other authority records that can possible be controlled incorrectly. We opted to exclude those that have the 667 note that says it was automatically created. We rely on the individual subject headings instead.

In the case of Imaginary creatures, it's LCAC not LCSH, so will not control.

Recently I've noticed that I am unable to highlight data in the Quick Search, Command Line, or Keyword/Numeric Searches. For example, if I want to delete the data and enter a new search, I have to backspace to delete.

Answer: This has happened to a few of us. It happened changing from Window 7 to Windows 10, also when changing laptops, not sure why. If you continue to have this problem, reach out to OCLC Customer Support.

Are there any plans to include more information in BFAS about WC Discovery for WorldShare libraries? There are some linkages to BFAS from the Discovery documentation, but not from BFAS out to Discovery. An example would be information on what bib fields and subfields display in Discovery.

Answer: Interesting! We are not aware of this linking to BFAS, it will be investigated. We do not have any plans to incorporate that kind of information but will give it some consideration once we can see the linkages that you see.

Should we add Fictitious characters in 650 or 600? I seem to see a mix of both?

Answer: Current practice is to enter them in field 600 rather than 650, which was the older practice. However, if the heading is still in the authority file established as a 650, go ahead and enter it that way so that we are able to switch it in the future when the tag changes.

The French subject headings list (RVM) is still using 650s for fictional characters, I haven't seen a transition to 600s yet.

Comment: RVM documentation indicates that they aren't currently planning on switching to 600.

Can you expand on the difference in controlling headings in the different applications (Connexion vs. Record Manager) that Jay mentioned?

Answer: That was in relation to the fact that there are additional authority files that will be available in Record Manager that will not be available in Connexion, including Getty Art and Architecture Thesaurus, MeSH and possibly others, these will be available in Record manager, not Connexion.

Since we switched to Windows 10, I have been having problems with macro boxes loading really slowly or macros hanging completely. I did report this to OCLC and tried several things they suggested, but the problem was never resolved. Is anyone else experiencing this?

Answer: It is hard to say, it may be because of how your computer is set up or what version of Windows you are using. It may act differently for different people in different places.. OCLC Customer Support should be contacted.

If you are interested in learning more about macros there are a couple of sights out there that go into Connexion macros, one is Hahn

library: <http://www.hahnlibrary.net/libraries/oml/connex.html> and <https://github.com/wnickeson/Walt sMacros>.

You can make changes to some PCC records and some you can't, why is that?

Answer: All of that is outlined in detail in BFAS Chapter 5.2, Member capabilities.

If a detail is changed in a PCC record that doesn't meet the permission level, does it get automatically reverted later?

Answer: If it does not meet the permission level you will get a error message that you are unable to make the change, at this time you can report to Bibchange@oclc.org to make the change for you. Keep in mind, the change may require proof.

We have full cataloging capability. Documentation indicates we should be able to add and edit 505 fields in PCC records. However, there have been several times we have not been able to add or edit 505 fields. Do you know why that would be?

Answer: If you are making other changes to the record at the same time and some of those changes are allowed according to your authorization level, but some of those changes are not allowed, you will not be able to replace the record at all.

If you are only making changes to the 505 field, save the record to the online save file and send us a message. We will see if figure out what is going on with it.

It may also be the situation that if you click into a field that are not allowed to edit then click out of it, could possibly recognize it as an edit even though you did not edit it. Make sure you have a fresh copy of the record when you edit the 505 field.

Last month Collection Manager reports were missing due to a glitch. I noticed this morning, I did not get any again even though I had files to download. I tried to log in to Statistics and was unable to do so. Do you know if there is a problem?

Answer: I don't think any of us does know. OCLC does have a status page oclc.org/status and that will show all the different systems where there may be maintenance going on. Using the Connexion help menu: HELP/Useful Web Links/OCLC System Alerts, or OCLC Customer support may be better able to answer that question.

Records in your local and online save file, how long do they stay in there? We have some record in that since 2014.

Comment: Local save file saves up to a maximum of a large number of records, records in both the local and the online save file will be there until you delete them.

Do you know off the top of your head a very hard work to catalog?

Comments: Many interactions of Bible, board games from the '60's & 70's, An 18th-century breviary with multiple pagings and a subtitle containing the names of a whole bunch of popes, any work in a script you're unfamiliar with. Hebrew, Aramaric, Korean, etc., any items that combine lots of smaller works by different authors with only marginal bearing on a particular subject (congresses, collaborative art projects, DVDs).