

2020-01-07 VAOH Session

Presentation summary

Charlene Morrison and Shanna Griffith presented: Best practices for editing WorldCat bib records. Their presentation included spot-the-error audience participation poll questions. The main focus of this presentation was correcting cataloging errors to conform to cataloging guidelines.

URLs mentioned during the presentation:

- AskQC: askqc@oclc.org
- Metadata Quality: bibchange@oclc.org
- Bibliographic Formats and Standards: <http://oc.lc/bfas>

Member questions

Can you please review which type of hybrid records should be reported, rather than edited?

Answer: For language of cataloging hybrid records, both print and electronic records, you'll want to report those which have close to, or an equal amount of, descriptive elements in both languages. Or records that have pretty close to the same amount of holdings based on location. Any time you aren't sure what a record represents, feel free to report those to us at bibchange@oclc.org.

How can we tell the language of cataloging of libraries with holdings attached? Do we need to check each library?

Answer: It depends on which interface you are using. In Connexion client, you can select the View menu option, then Holdings..., then All. This will display the holdings by country, state, province. Looking at how the holdings are grouped, you can get a general idea which language of cataloging likely has more holdings based on where those libraries are located. In Record Manager, holdings can be displayed by clicking the link stating how many libraries hold this item from the list view, or by clicking the other libraries link containing the number of holdings while viewing the record. There are tabs for All WorldCat Holdings, Holdings in My Region, and Holdings in My State.

Approximately how long does it take for OCLC to fix the language code mix-ups once reported?

Bibliographic change requests reported to us at bibchange@oclc.org are placed into staff workflow. requests are processed first in, first out, so depending on the number of requests received, Generally, requests are processed within a week.

Is there a way to submit errors to OCLC from within the bib record itself?

Yes, there is. In Connexion client, if you have the bibliographic record open, select Report Error ... under the Action menu item. This will open a dialog box that will provide us your OCLC Symbol, name, email address, and a free-text box for you to describe what you are reporting. A copy of the record as it is displayed on your screen will accompany the error report. In Record Manager, with the bibliographic record open, you can select Send Record Change Request under the Record drop-down menu item. In the dialog box, you can select the type of requested change, provide a description, your name, and email address. In Record Manager, a copy of the record is not attached to the request we

receive. OCLC's Bibliographic Formats and Standards, Chapter 5.5, [Requesting Changes to Records](#) documents the different ways you can report errors to us.

If I find a record with no language of cataloging indicated (i.e. no 040 \$b) but with all the notes & 3XX fields written in French, should I add the French lang of cat code or report the record to OCLC?

Yes, you can add the field 040 subfield \$b. There might be a few of these in WorldCat but should be fairly rare to come across. We have been making progress making sure records coming into WorldCat have a code in the 040 subfield \$b.

For CIP records, I missed the part of 040 that cannot be edited. What subfield can't be edited again? The \$b?

Yes, the 040 subfields \$b and \$e should not be edited in CIP records.

Bib Format & Standards for 588 field says: Note: Note: CONSER participants should not use 1st indicator values 0 or 1 in CONSER-authenticated records for integrating resources and serials at this time. The Library of Congress and OCLC will announce the implementation of these values for use in the CONSER database at a future date. Is this still the case?

As far as we are aware this is still the case. We do not have a date yet when we can change this practice. When that does happen we will be looking at converting existing 588 fields to conform to the way the rest of them mostly look in WorldCat now. Currently, we are waiting for the Library of Congress to make an announcement to when they are making their system changes so that we can update documentation and have CONSER participants code field 588 with the indicators.

When making a new record, do you encourage to add e-ISBNs to a print version record in 020 \$z, and vice versa?

Yes, that would be fine to do.

Usually when I edit a record, everything goes well, but sometimes I get a message saying I don't have permission. What determines that?

The level of cataloging for your library or institution can determine what you can and cannot edit in a bibliographic record. In Record Manager, this is called [Record Manager account roles](#). OCLC's Bibliographic Formats and Standards, Chapter 5.2, [Member Capabilities](#) documents the types of edits which can be made based on the different authorization levels. Next month's Virtual AskQC Office Hours session will cover enriching bibliographic records and will also cover this topic.

What are your thoughts on removing 650 like "Mexican fiction--21st century" for individual novels by an individual author, which Subject Headings Manual explicitly tells you not to do, but a lot of libraries seem to like adding to records for their local users?

Subject headings that violate the instructions in the LC [Subject Headings Manual](#) are okay to remove.

You said it's allowed to edit the date in the call number in the 050. Is that only allowed for Encl 8 records? With the piece in hand?

With the piece in hand, you may edit the date in the call number. This is also true for other records as well, not just encoding level 8 records; however, you may or may not be able to edit field 050 of records

created by a national library depending on your level of authorization. Please refer to OCLC's Bibliographic Formats and Standards, Chapter 5.2, [Member Capabilities](#) for more information on this topic.

When deriving a record in WMS-Rec.Mgr. the 040\$e 'pn' (for provider neutral) is lost. Is there a reason for this or is this a bug?

The 040 field does not transfer when deriving a bib record. If the 040 \$e rda appears in a newly derived record it's due to a user preference for creating new records with Default Record Format = RDA.

At Library and Archives Canada, we assign both English and French subjects regardless of language of cataloguing. We would like to make sure that subjects in both languages are not deleted from records based on the language of cataloguing in 040 \$b.

Subject access points are not considered when determining the language of cataloguing. Records can have subject access points from different schemas and in different languages. These should not be changed or deleted from bibliographic records. For more information, please see Bibliographic Formats and Standards, Chapter 2.6, [Language of Cataloguing](#).

What is the latest news regarding the new guidelines for minimally punctuated records? Are macros available yet for adding or removing punctuation in OCLC records?

Yes, there are macros available now which will work in the Connexion client. It is part of the OCLC Macrobook 2019 which can be downloaded from the [Cataloging software downloads](#) page along with the OCLC Macrobook 2019 instructions. Laura and Robert have been on the task group to work on minimal punctuation guidelines training materials which are just being finalized and those should be made available on the PCC website, probably sometime this month. We will be having a Virtual AskQC Office Hours presentation on this topic in March.

Do records with encoding level 8 and I get merged at some point?

They can, but what often happens is encoding level 8 records get upgraded by either the original library or by a PCC participant. If you find cases like this you can report them to us as duplicates.

Would you expect cataloguers in the UK to use 'color' in, say, field 300, or can we get away with use of UK spelling 'colour', particularly when creating records from scratch?

It is a valid spelling, so if you are creating the bibliographic record, you are certainly welcome to spell it colour.

2020-01-16 VAOH Session

Presentation summary

Charlene Morrison and Shanna Griffith presented: Best practices for editing WorldCat bib records. Their presentation included spot-the-error audience participation poll questions. The main focus of this presentation was correcting cataloging errors to conform to cataloging guidelines.

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Member questions

This is pretty hard to fix records in an Asian language you don't know when the only English element is p. and cm. in the 300.

If you don't feel comfortable or have the language expertise to edit a record, it is best to leave the record as is.

In the French hybrid record example wouldn't the 300 field also be in French?

Yes. The word 'pages' is the same in both English and French.

For books in French, would the 245 be in French, not English?

In the presentation example, the text of the resource is Italian, and the code in the fixed field in Lang is 'ita'. The code in the 040 subfield \$b is 'fre' as the bibliographic record was created by an institution that catalogs in French.

What documentation indicates that we don't add extent for online resources? There is an example in BFAS that includes page numbers. I know you're not supposed to include the size but the last quiz indicated that adding the page numbers was incorrect.

Extent is appropriate where applicable in bibliographic records for electronic resources.

On the last spot the error quiz, the answer options were: A) Field 300 includes *size* B) Field 337 has incorrect term C) Field 856 has incorrect second indicator D) All of the above.

How can you tell when you can change a record coded as print into electronic resource and when are you not allowed to do that?

It is hard to supply a definitive answer that could apply to all cases. You would want to evaluate these records individually on a case-by-case basis. If you have questions about a specific record you are always welcome to ask us at askqc@oclc.org or bibchange@oclc.org and we will be glad to work with you.

For English-language cataloging agencies holding foreign-language materials for patrons who speak that language, how much can/should you change a record before it becomes "hybrid"? You may have, for example, subject headings in both languages.

Records should only contain descriptive cataloging data in one language. If you wish to add cataloger supplied notes for non-English speaking patrons, you would want to use fields for local use for that information. For 505 table of contents notes and 500 quoted notes, these are taken from the resource and should be in the same language as the resource.

The language of the subject access points is not a factor when determining the language of cataloging. Use the 6xx fields to provide subject access entries and terms. Most 6xx fields contain subject added entries or access terms based on the authority files or lists identified in the 2nd indicator or in subfield #2 and terms can be in languages other than the language of cataloging.

For hybrid non-English language of cataloging records, could you explain further about considering the number of holdings by English language of cataloging libraries? Is there a tipping point where you would change the language of cataloging?

Holdings are only one factor to consider when evaluating a hybrid record and there is no tipping point where based on this information alone you would change the language of cataloging. You will also want to determine the intent of the cataloging agency and the number of descriptive cataloging elements in different languages. As a general rule, a record's language of cataloging should reflect the predominant language used in the descriptive cataloging elements. For more information about language of cataloging and hybrid records, please see Bibliographic Formats and Standards, 2.6 [Language of Cataloging](#).

If the book i have in my hand has no date but is probably published after 1945 and the oclc record has 1991? what date should be used for the call number, would we add a z to 1950z.

Assigning call numbers would be a local practice and would depend on how your institution assigns call numbers or revises them for local use.

You're not supposed to put the 505 and 520 in the language of the resource if you're an English language agency?

The 505 contents note is taken from the resource and should be in the language of the resource. A field 520 summary note is cataloger supplied and would be in the language of the cataloging agency unless a summary is being taken from the resource itself, in which case it would be in a quoted note as it appears in the item.

When cataloging an academic thesis will we still use the 500 tag to "include appendix (leaves 54-60)"?

Yes, an includes appendix note or index only note goes in field 500, they would go in field 504 when combined with a bibliography note.

For videos that have no language (no audio videos) would it be okay to remove the "eng" in 041?

If Lang (field 008/35-37) is coded zxx (No Linguistic Content), then you most likely would not have a code in field 041 subfield \$a. If there are credits or accompanying material, then there may be language codes used in other subfields in field 041.

Is it okay to add annotations in both languages if an English cataloging agency catalogs books in Spanish, French, etc.

This would be a situation where the MARC standard doesn't necessarily support the use of multiple languages for describing a resource. So if you are an English language institution you should not add non-English language descriptions unless you are able to add a quoted note from the item.

Why can't full members edit encoding level? I often find very complete records with low encoding level. I assume this is because people have enhanced them, but they can't edit encoding level. What are we supposed to do if we enhance a record like that?

You cannot change encoding level 8 or encoding level 1. Next month's Virtual AskQC Office Hours session will cover enriching bibliographic records and will also cover this topic.

But you can change EnLvl M to I?

Yes, you can change encoding level M to I.

What would be the criteria for either merging or not merging records?

There are a lot of things taken into consideration regarding merging records. If you look at BFAS, Chapter 4, [When to Input a New Record](#) you will see many of those criteria are essentially the same criteria used for merging or not.

Hello--I recently noticed that the [WorldCat.org](#) website sometimes has Table of Contents from machine generated Table of Contents, if there is not a 505 in the print record. Do you know anything about this procedure and where the TOC are coming from?

They are being imported from third party vendors along with abstracts and summary notes when lacking in bibliographic records. If a cataloger adds a table of contents note into the bibliographic record, that will replace the imported note being displayed in the WorldCat.org interface.

I just reported a record the other day that looked like it should be merged. Is it better to report an error in Connexion or email? Or doesn't it matter?

OCLC's Bibliographic Formats and Standards, Chapter 5.5, [Requesting Changes to Records](#) documents the different ways you can report errors to us. Whichever method works better for you and your workflow is the best method to use. All methods come into the Metadata Quality staff workflow for processing.

Is there any kind of notification process for when records are marked for deletion or when they are about to be merged?

No, there is not.

We recently notice tag 227 used to record another OCLC record number. Does this indicate a duplicate record?

No, it does not, field 227 is not a valid field in MARC. Thank you for reporting this to us so we could locate them and delete the fields. Records which have been merged have their OCLC Record Number (OCN) retained in the 019 field.