Virtual AskQC Office Hours

Punctuation updates and policies
OCLC Metadata Quality
March 2020
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• After the session, you will be directed to a brief, optional survey
One the call today

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Punctuation Updates and Policies

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Introduction

• Discussions on removal of ISBD punctuation in MARC records began within the Program for Cooperative Cataloging (PCC) about 10 years ago

• Rationale for removal:
  • Eliminates redundant coding, e.g., 245 $c and space-slash-space mean the same thing
  • Easier to create records
  • Other MARC formats do not include punctuation
  • Data easier to map in and out of MARC, e.g., MARC to BIBFRAME and BIBFRAME to MARC
Terminology

- ISBD punctuation – we are really talking about all punctuation that coincides with MARC coding not just punctuation prescribed by the ISBD standard
- Final punctuation – this refers to terminal periods, typically at the end of fields
- Medial punctuation – punctuation occurring at the end of a subfield often signaling what kind of data is found in the next subfield
- Minimal punctuation – a record created without most punctuation, but not necessarily all punctuation, omitted = without punctuation
PCC Policy

• PCC Policy on Minimal Punctuation
  • In September 2019, PCC approved a policy to allow PCC participants to authenticate minimally punctuated MARC bibliographic records. This policy was implemented in January 2020

• See the full policy on the PCC website at www.loc.gov/aba/pcc/
PCC Policy

- PCC policy allows for:
  - Inclusion of punctuation in RDA records (Leader/18 (Desc) = i)
  - Omission of final punctuation in RDA records (Leader/18 (Desc) = i)
  - Omission of final & medial punctuation in RDA records (Leader/18 (Desc) = c)

- Newly created PCC records may be entered directly into the database with minimal punctuation
PCC Policy

• PCC catalogers should ensure punctuation is consistent within a record and matches the Leader/18 (Desc) encoding before authenticating it, i.e., adding 042 pcc

• PCC catalogers should not convert existing PCC records from full punctuation (Leader/18 (Desc) = a or i) to minimal punctuation (Leader/18 (Desc) = c), or from minimal punctuation to full punctuation
OCLC Policy

- Previous OCLC policy was outlined in BFAS on the page for Desc.
- Previous OCLC policy preferred use of full punctuation, e.g., if you found a record lacking punctuation, you were okay to add punctuation and replace the record.

- New OCLC policy is outlined in BFAS 2.8 is similar to PCC practice.
- New OCLC policy allows you to create records with or without punctuation separating elements of the description which coincide with subfield coding.
OCLC Policy

• If you find an existing record that omits punctuation, do **not** add punctuation and replace the master record

• If you find an existing record that includes punctuation, do **not** remove the punctuation and replace the master record

• In either case, you may edit the record for local use as needed
OCLC Policy for Records with Minimal Punctuation

• Omit punctuation at the end of the preceding subfield in most cases
• Omit parentheses around geographic coordinates and series statements as well as qualifier subfields in fields other than access points
• Omit terminal periods following the displayed text unless the field ends with an abbreviation or initial (Currently, the control heading process adds terminal periods to access points – to be fixed in the future)
• Supply punctuation within the text of any subfield as needed per cataloging instructions used to create the record
• Supply punctuation within authorized access points per the practice used in the related authority file
• Code Desc with c or n for records with minimal punctuation
Coding *Desc* and Field 040

- RDA record with minimal punctuation:
  
  Desc  c  *(code c rather than i)*

  040  XXX ǂb  eng ǂe  rda ǂc  XXX

- AACR2 record with minimal punctuation:

  Desc  c  *(code c rather than a)*

  040  XXX ǂb  eng ǂe  aacr/2 ǂc  XXX

- Pre-ISBD records with minimal punctuation would be *Desc n*
Omitting Final Punctuation

• Omission of terminal periods is now optional for records with punctuation

• Terminal periods are always omitted in records with minimal punctuation

• Retain any periods following initials or abbreviations
Omitting Final Punctuation—Examples

504 Includes bibliographical references.
504 Includes bibliographical references

500 "First edition published by Routledge 2012"

655 7 Portraits. ‡2 fast ‡0 (OCoLC)fst01423831
655 7 Portraits ‡2 fast ‡0 (OCoLC)fst01423831
Omitting Medial Punctuation

• General Rule—Omit punctuation from the end any subfield, i.e., omit the punctuation if a MARC subfield code follows

• Exceptions include some punctuation in access points, some punctuation that is to be relocated, and some punctuation that is to be retained
Omitting Medial Punctuation—Examples

245 10 Citrus bergamia: ‡b bergamot and its derivatives / ‡c edited by Giovanni Dugo, Ivana Bonaccorsi.
245 10 Citrus bergamia ‡b bergamot and its derivatives ‡c edited by Giovanni Dugo, Ivana Bonaccorsi

264 31 ‡3 v. <10>-78: ‡a Dordrecht; ‡a Boston; ‡a London: ‡b Kluwer Academic Publishers
264 31 ‡3 v. <10>-78 ‡a Dordrecht ‡a Boston ‡a London ‡b Kluwer Academic Publishers
Omitting Medial Punctuation—Examples

300 271 pages ‡b illustrations ‡c 21 cm ‡e 1 atlas (37 pages: color maps; 37 cm)
300 271 pages ‡b illustrations ‡c 21 cm ‡e 1 atlas (37 pages: color maps; 37 cm)

776 08 ‡i Online version: ‡a Williamson, John Harvey, 1937- ‡t Born on the links. ‡d Lanham, Maryland: Rowman & Littlefield, [2018] ‡z 9781538114537 ‡w (DLC) 2018003471

776 08 ‡i Online version ‡a Williamson, John Harvey, 1937- ‡t Born on the links ‡d Lanham, Maryland: Rowman & Littlefield, [2018] ‡z 9781538114537 ‡w (DLC) 2018003471
Relocating Medial Punctuation

- Some subfields are ambiguous without the preceding punctuation, e.g., 245 $b can contain other title information, parallel titles, or second, third, fourth title, etc., for a work lacking a collective title.

- Relocate ISBD mark of parallel language information.

- Relocate ISBD punctuation related to combined works.
Relocating Medial Punctuation—Examples

245 10 Itinerarios de lectura = ‡b A journey in readership : homenaje a Cathy L. Jrade.
245 10 Itinerarios de lectura ‡b = A journey in readership : homenaje a Cathy L. Jrade

245 10 Saigū no bungakushi = ‡b The literary history of Saigu = Zhai gong wen xue shi / ‡c Motohashi Hiromi.
245 10 Saigū no bungakushi ‡b = The literary history of Saigu = Zhai gong wen xue shi ‡c Motohashi Hiromi
Relocating Medial Punctuation—Examples

245 10 Oklahoma! ; ‡b Carousel ; South Pacific / ‡c Rodgers & Hammerstein.
245 10 Oklahoma! ‡b ; Carousel ; South Pacific ‡c Rodgers & Hammerstein

245 14 The rite of spring ; ‡b Petrushka / ‡c Stravinsky.
245 14 The rite of spring ‡b ; Petrushka ‡c Stravinsky
Retaining Integral Punctuation

• Retain internal ISBD punctuation that appears within a subfield, i.e., when there is no separate subfield available.

• For example:
  • Space-equals-space used to indicate parallel language information within 245 $b$
  • Space-semicolon-space used to separate one statement of responsibility from another within 245 $c$
  • Space-semicolon-space used to separate extent from size within 300 $e$
Retaining Integral Punctuation—Examples

245 10 The Colorado curveball / ™c by David A. Kelly ; illustrated by Mark Meyers.
245 10 The Colorado curveball ™c by David A. Kelly ; illustrated by Mark Meyers

245 14 Les Ballets jazz de Montréal : ™b au gré des rencontres depuis 40 ans = encounters in motion 40 years on.
245 14 Les Ballets jazz de Montréal ™b au gré des rencontres depuis 40 ans = encounters in motion 40 years on
Retaining Integral Punctuation

• Retain punctuation that is integral to the data no matter where it appears

• For example:
  • Transcribed punctuation (e.g., exclamation points, question marks)
  • Periods following abbreviations and initials (e.g., Jr., in., Inc.)
  • Serial commas (e.g., one, two, three)
Retaining Integral Punctuation—Examples

245 10 Why did America go wild over the Beatles? / ÷c by Bro. Maze.
245 10 Why did America go wild over the Beatles? ÷c by Bro. Maze

300 2 audio discs (1 hr., 20 min., 3 sec.) : ÷b digital, CD audio ; ÷c 4 3/4 in.
300 2 audio discs (1 hr., 20 min., 3 sec.) ÷b digital, CD audio ÷c 4 3/4 in.
Retaining Punctuation in Access Points

• Retain punctuation that appears within access point fields, except for final punctuation and punctuation that separates the access point from the relationship information or series volume numbering.

• Text string in the access point, including its punctuation, should match the text string in the corresponding authority record.

• Retain punctuation separating names and titles in name-title access points.
Retaining Punctuation in Access Points—Examples

100 1 Bauman, Jon W. ‡q (Jon Ward), ‡d 1939-2009, ‡e author.
100 1 Bauman, Jon W. ‡q (Jon Ward), ‡d 1939-2009 ‡e author

711 2 Gettysburg Seminar ‡n (9th : ‡d 2002 : ‡c Gettysburg, Pa.), ‡j author.
711 2 Gettysburg Seminar ‡n (9th : ‡d 2002 : ‡c Gettysburg, Pa.) ‡j author
Book Record—With Punctuation

100 1 O'Rourke, John ‡c (Graphic novel writer), ‡e adapter.
245 14 The Oregon trail / ‡c Francis Parkman ; illustrated by Henry C. Kiefer ; adaptation, John O'Rourke.
264 1 Newbury, Berkshire : ‡b CCS Books, ‡c 2017.
300 48 pages : ‡b chiefly color illustrations ; ‡c 25 cm.
490 1 Classics illustrated ; ‡v no. 65
700 1 Kiefer, H. C. ‡q (Henry Carl), ‡d 1890-1957, ‡e illustrator.
700 1 ‡i Adaptation of (work): ‡a Parkman, Francis, ‡d 1823-1893. ‡t Oregon Trail.
100 1  O'Rourke, John ‡c (Graphic novel writer) ‡e adapter
245 14 The Oregon trail ‡c Francis Parkman ; illustrated by Henry C. Kiefer ; adaptation, John O'Rourke
264 1 Newbury, Berkshire ‡b CCS Books ‡c 2017
300  48 pages ‡b chiefly color illustrations ‡c 25 cm
490 1  Classics illustrated ‡v no. 65
700 1  Kiefer, H. C. ‡q (Henry Carl), ‡d 1890-1957 ‡e illustrator
700 1  ‡i Adaptation of (work) ‡a Parkman, Francis, ‡d 1823-1893. ‡t Oregon Trail
830  0 Classics illustrated (Newbury, England). ‡p Joint European series ‡v 65
Map Record—With Punctuation

110 2  Cartographia Kft., ‡e cartographer, ‡e publisher.

245 10 Cairo = ‡b Kairo = Le Caire = Kairó / ‡c Cartographia, the map expert.

255  Scale 1:13,000 ‡c (E 31°12′30″--E 31°17′14″/N 30°04′37″--N 30°00′14″).

264 1 Budapest: ‡b Cartographia, ‡c [2011]

300 1 map: ‡b color; ‡c 61 x 58 cm, on sheet 84 x 60 cm, folded to 21 x 11 cm
Map Record—Without Punctuation

110 2 Cartographia Kft. ‡e cartographer ‡e publisher

245 10 Cairo ‡b = Kairo = Le Caire = Kairó ‡c Cartographia, the map expert

255 Scale 1:13,000 ‡c E 31°12′30″--E 31°17′14″/N 30°04′37″--N 30°00′14″

264 1 Budapest ‡b Cartographia ‡c [2011]

300 1 map ‡b color ‡c 61 x 58 cm, on sheet 84 x 60 cm, folded to 21 x 11 cm
Videorecording Record—With Punctuation

245 00 Marchands à Venise = ‡b Merchants of Venice / ‡c un film de Hervé Beau ; réalisation, Hervé Beau ; montage, Hervé Beau, Emilie Berteau ; Vidémo.

246 1 ‡i Title on disc label: ‡a Merchants of Venice

264 1 [Ireland] : ‡b Planet Group Entertainment, ‡c [2020]

300 1 videotape (49 min.) : ‡b sound, color ; ‡c 4 3/4 in.

700 1 Beau, Hervé, ‡e director.
245 00 Marchands à Venise Ḟb = Merchants of Venice Ḟc un film de Hervé Beau ; réalisation, Hervé Beau ; montage, Hervé Beau, Emilie Berteau ; Vidémo

246 1 Ḟi Title on disc label Ḟa Merchants of Venice

264 1 [Ireland] Ḟb Planet Group Entertainment Ḟc [2020]

300 1 videodisc (49 min.) Ḟb sound, color Ḟc 4 3/4 in.

700 1 Beau, Hervé Ḟe director
Resources

• OCLC macros for use in Connexion Client
  • **PunctuationAdd** adds punctuation to fields in either a single record or all records in a local or online save file and adjusts the coding in *Desc (Leader/18)* and in field 040 as needed
  • **PunctuationDelete** removes punctuation from fields in a single record or all records in a local or online save file and adjusts the coding in *Desc (Leader/18)* and in field 040 as needed
  • Download at [oc.lc/cat-downloads](http://oc.lc/cat-downloads)

• MarcEdit can be used for addition or removal of punctuation
• Some authority control vendors can add or remove punctuation
Resources

• OCLC Bibliographic Formats and Standards (oc.lc/bfas)

• PCC’s Policy Guidelines for Minimally Punctuated MARC Records (www.loc.gov/aba/pcc/documents/PCC-Guidelines-Minimally-Punctuated-MARC-Data.docx)

• PCC’s Training for Minimally Punctuated MARC Bibliographic Records at (www.loc.gov/aba/pcc/sct/documents/GuidelinesMinimallyPunctuatedMARC-SCT-2020-01.pptx)
What questions do you have?

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Thank you!

April Virtual AskQC Office Hours
Updates to record validation and the OCLC MARC

Tuesday, April 7 at 9:00 AM Eastern
Thursday, April 16 at 4:00 PM Eastern

Registration available at oc.lc/askqc

Send cataloging policy questions at any time to askqc@oclc.org
Session links available at oc.lc/askqc