

# 2020-03 VAOH session

<b>Topic</b>	Punctuation updates and policies
<b>Date</b>	2020-03-03; 2020-03-12
<b>Presenter</b>	<a href="#">Bremer,Robert Ramsey,Laura</a>
<b>Number of participants</b>	2020-03-03: 122 2020-03-12: 109
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## Participants

### In presentation room

- Webex host: Patty Treboni
- Emcee: Charlene Morrison
- Presenter(s): Robert Bremer and Laura Ramsey
- Panelist: Robin Six
- Attendee/note taker: Shanna Griffith
- Others in the room: Cynthia Whitacre

## File list

File 	Modified
PDF File 2020-03 VAOH punctuation.pdf	Mar 03, 2020 by Morrison, Charlene
Microsoft Powerpoint Presentation 2020-03 VAOH punctuation.pptx	Mar 03, 2020 by Morrison, Charlene
Microsoft Excel Spreadsheet AttendanceDetailedReport20200303.xlsx	Apr 06, 2020 by Treboni,Patty
Microsoft Excel Spreadsheet AttendanceDetailedReport20200312.xlsx	Apr 06, 2020 by Treboni,Patty
Microsoft Excel Spreadsheet AttendanceDetailedReport20200312Absent.xlsx	Apr 06, 2020 by Treboni,Patty

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## Presentation summary

Robert Bremer presented: Punctuation updates and policies. The presentation provides the rationale for the removal of punctuation, with the main focus on creating and editing records based on these updates and policies.

URLs mentioned during the presentation:

- AskQC: [askqc@oclc.org](mailto:askqc@oclc.org)
- OCLC's PunctuationAdd and PunctuationDelete macros: [oclc.org/cat-downloads](http://oclc.org/cat-downloads)
- Bibliographic Formats and Standards: <http://oclc.org/bfas>
- PCC's Policy *Guidelines for Minimally Punctuated MARC Records*: <http://www.loc.gov/aba/pcc/documents/PCC-Guidelines-Minimally-Punctuated-MARC-Data.docx>
- PCC's *Training for Minimally Punctuated MARC Bibliographic Records*: <http://www.loc.gov/aba/pcc/sct/documents/GuidelinesMinimallyPunctuatedMARC-SCT-2020-01.pptx>

## Member questions (2020-03-03)

**Topic specific:**

**Can you remind me again what these record examples would be coded as?**

Answer: If you are creating a brand new record and you are including all of the punctuation, there is no difference in how you would code that over what you had been doing in the past. The difference would be in coding Desc in the Fixed Field if you decided to do minimal punctuation. So for RDA, you would code Desc: c rather than Desc: i which indicates that the punctuation has been omitted. Also, if you were coding a record as AACR2, you would code Desc: c rather than Desc: a and then add an indication that AACR2 rules were used by putting in 040 \$e aacr/2.

**Can you please give a brief review as to why removing the punctuation is a good idea? What is the benefit to the users?**

Answer: The aesthetics of it. It's easier to probably supply punctuation in some display schema than it is to suppress all of the punctuation in a display that we sometimes do not need. So to make the data easier to manage, it would be better if punctuation wasn't there. How you view this is very much governed by your local system and its capabilities. In these discussions over the past several years, people are either okay with this idea or they really don't like it at all. We can appreciate both viewpoints based on what system you have to work with. We also understand that the BIBFRAME to MARC conversion that is now being developed by the Library of Congress will most likely omit the punctuation. So, when it's converting from BIBFRAME back to MARC, the MARC record that results won't have punctuation. Like it's described here, it will omit the final punctuation and the medial punctuation. That is another reason that, going forward into the future, we'll probably be seeing less and less records with punctuation.

**Should punctuation be relocated (e.g. 245 \$b) in all cases?**

Answer: In the case of 245 \$b, it's just the equal sign (=) indicating parallel language information, and the semicolon (;) in the case of multiple titles without a collective title. If it's just the ordinary \$b where you subtitle or other title information, that colon would be omitted altogether rather than relocated.

**Is there a space before and after subfields? For example, space \$b space?**

Answer: In the case of OCLC displays, there is spacing around the subfield codes. That is not actually the case in what would be output as the MARC record.

**So if we create a new record, should we use this new policy or is it optional?**

Answer: It's optional, whatever works best in your system and in your situation. If you prefer to continue using punctuation, that is fine. If you decide to omit punctuation in step with these guidelines, that is certainly okay as well.

**In an RDA record with Fixed Field Desc: i, sometimes one or two pieces of punctuation are missing. Other than final punctuation, should these be supplied for consistency and the master record replaced?**

Answer: It is certainly okay to do that. The punctuation in the record should be consistent with the coding in Desc. If it's the case where most of the fields have punctuation and the description is coded as Desc: i, then the intent would be to go ahead and include punctuation in fields. That does not necessarily involve terminal periods. If you have a record that is coded Desc: i and you notice that the colon is missing before 260 \$b, go ahead and put that colon in and replace the record.

**When leaving off final punctuation only, will the code remain Desc: i or Desc: a?**

Answer: Final punctuation is not the determining factor in how you code Desc because it's optional for both records that have full punctuation and records that have minimal punctuation. If you are including most of the punctuation as you have routinely done and you're just omitting the final periods, it would still be coded as Desc: i rather than Desc: c, in the case of an RDA record.

**For the following example, which punctuation can be omitted?**

**245 00 Ji qian jia zhu Du gong bu shi ji : \$b er shi juan ; Du gong bu wen ji : er juan.**

Answer: In terms of what is provided in the example, the colon before \$b could be omitted, but the other punctuation that occurs within the \$b would be retained.

**My reference librarians are concerned that the colon separating a title from the subtitle would create inaccurate citations using citation software. Apparently some citation software rely on the colon to create citations. Does OCLC include the proper punctuation in the citation software?**

Answer: OCLC does not put out our own citation software. There are a number of commercial packages or other home developed packages of citation software that are out there. You are welcome to use those with OCLC records, but we can't predict what will happen with those.

**I've seen a few records recently with commas in the place of the ISBD punctuation (e.g. in the 245). Should these be removed or replaced?**

Answer: Given what our policy is at this point, you would want to replace those. In other words, fix the punctuation rather than go the route of removing it. If you have a record that really is a toss-up because there was some coding in Desc that really didn't match the coding in the various fields, some had it and some didn't, but it's half and half. At that point, it probably doesn't matter which way you change the record. The goal would be to make it consistent. Incorrect punctuation should always be corrected if you notice it and want to do so. This might be a good example of why it might be better to omit punctuation than to fiddle around with fixing it.

**Are there any plans to eventually remove punctuation from existing OCLC records created before the approval of the new minimal punctuation policy?**

Answer: This is something that we would like to do, but it is a long term strategy. We haven't determined whether we will or will not do it, and if so when we would do it. It is something we have talked about internally and would like to do, but it does not mean that we are going to do it. Our reasons would be that we think the data, going into the future, will be more consistent. If we did, we would provide advance notice of our doing so, so that you could deal with records that come to you as an output from Collection Manager or just the fact that you would find more records in the database that lacked punctuation.

**If the punctuation can be removed automatically, why would individual catalogers take the time to punctuation from existing records?**

Answer: That would depend on local policies, workflows, and how much time people want to spend on records. This would be a prime place to use the OCLC PunctuationAdd or PunctuationDelete macros.

**WorldCat Discovery removes all punctuation. Isn't that an advantage of Discovery?**

Answer: Certainly those of us who are in favor of removing punctuation think it's an advantage. When we have talked to our Discovery colleagues here at OCLC, they think the idea of removing punctuation from all bibliographic records is great because they won't have to pro-grammatically remove it for displays in Discovery.

**Is the Fixed Field Desc: i or Desc: a used by any public catalog you know of?**

Answer: It's really probably more of an indication for other subsequent users of that record in terms of cataloging. I don't know of any catalog that takes that code and then, as a result, does something special in the display. The code Desc: c to indicate that it's an ISBD record with punctuation omitted was added to the MARC format somewhere around 2008-2009. It was a proposal made by the libraries in Germany. We load a lot of those records, and they have no punctuation in them. The value of that code is to indicate that is how the record is supposed to be, so that if punctuation snuck back in to such a record, it could possibly be removed. In the case of Desc: i, if a field was added to the record even through field transfer that we do here at OCLC, we could say that field is supposed to have punctuation and possibly supply it.

**If we encounter a record with inconsistent punctuation, should we make edits and replace the master record to remove the punctuation?**

Answer: Yes, there is no reason that you couldn't go ahead and do that, if you want to. Like anything else in a record, it's up to you whether it's worth the time and effort to fix a problem. A punctuation problem is relatively minor in terms of everything that could possibly be incorrect in a bibliographic record.

**Will Discovery or any discovery system you know of be able to determine whether ISBD moved to the other side of \$b such as = is ISBD vs. integral to the other title info?**

Answer: As there are more records that have minimal punctuation, systems will adapt. If you are thinking along the lines of if a system is automatically going to supply a colon before \$b no matter what, probably few systems know to do that at this point. So if that is programmed into some system display in the future, it would need to take into account 'supply the colon before \$b except if there is an equal sign or semi-colon as a the character in \$b'. It does get you out of the problem of having a display of the title proper in \$a with an equal sign hanging on the end if \$b is suppressed from a display.

**How does duplicate detection affect this? Can records be merged with different standards for punctuation?**

Answer: That certainly is the case now in that we deal with different styles of punctuation in duplicate detection, so there is no problem in our being able to compare fields and match records when they're created under different rules. If there is a publication from the 1950s where there is no ISBD punctuation but we have a duplicate record that does have ISBD punctuation, we are able to compare those fields and then select the record, not necessarily on which rules were used but more in the case of completeness of the data and the number of holdings that are found on that record.

**How will this affect clustering with newer and older records?**

Answer: As is the case with duplicate detection, it really should have no impact because we normalize out any kinds of comparisons we do with data, any punctuation that's there. So we are typically looking at the wording in any subfield in order to tell if any records look like they represent the same thing in terms of duplicate detection. Or that they are different versions of the same work in terms of other clustering.

**Some staff think the colon between the title and subtitle makes it easier to read the title display in Discovery. Without the colon it's hard to know where the main title and subtitle begin and end. Is it possible for OCLC to automatically add a colon to the display?**

Answer: That seems to be the most common questions in terms of removing punctuation, but the idea behind is that display punctuation shouldn't reside with the data. Display punctuation is something that systems should supply. So, in answer to the question about is it possible, certainly it is possible. Schedules for implementing these kinds of things are always the issue.

**What impact on patrons can you think of for records with or without punctuation? Citations generators is all I can think of.**

Answer: I'm not sure I can think of anything else. I look at it from the perspective of clean data that can be easily manipulated for various kinds of displays without the need for suppressing that kind of data. It's the case that, because MARC was developed as long ago as it was with punctuation in tact, and that we've never made the effort to change that, that we still have punctuation within our bibliographic data.

**General questions:**

**If a record has a series statement that pertains to a local collection (for example, indicating that the piece is in a local archive), should it be removed from the master record?**

**For example, "Making of Modern Law" as used by Gale. When I change these records to a 040 \$e pn then I want to remove this because it doesn't apply to all other sources. Or, HeinOnline collections, same situation.**

Answer: This is an interesting area because so often headings for local collections are established as corporate bodies rather than series. We have certainly seen institutions handle it both ways. For the most part, I would look at it and say that it is purely local information that is not of widespread interest outside the institution, and it really should be treated as local information and not included in the master record. So it sounds like it would be okay to possibly remove it. If it was a high profile collection, a special collection within some institution, it could presumably be retained, but I would question if it should be retained as series or if it should be put in as a 710 with the name of the collection with a \$5. Another deciding factor could be is it incredibly rare material that is only contained in one institution, in which case it is certainly fine for that information to appear. But if it is held by hundreds of libraries, then it is probably not such a good idea to have it in the record. So, it's a judgement call.

If there is a provider specific series in a record that is intended to be provider neutral and is available from all providers, then the one specific provider series is not applicable to all instances of that resource online and can be removed. In these cases there are a lot of records that appear with an 856 link to that specific collection, which is appropriate.

Field 710 with the name of the provider, any 490/830 fields with a series that is based on the provider are not applicable in a provider neutral record.

**I have been attending the RDA new concepts series and there are yet guidelines on what MARC fields will be used for some of the new concepts like representative expressions. Is OCLC planning for these?**

Answer: As soon as there are new fields and/or new subfields for some of these new concepts, we will implement them. We can't implement them until they are defined. There is a lot of discussion going on about how some of these new ideas will be represented in bibliographic records. That process is discussion papers or proposals go before the MARC Advisory Committee, and once they have approved it, then the Library of Congress issues a notice saying that these are now official. At that point, OCLC will work towards implementing the new fields but not before.

## Member questions (2020-03-12)

**Topic specific:**

**Did you explain why punctuation is being removed? It seems like the 300 \$e would be confusing without the + sign preceding accompanying material.**

Answer: The plus ( + ) preceding 300 \$e is not really any different than a colon or a semi-colon that precedes a subfield in other cases. You could always expect that preceding 300 \$e you would have a plus sign to indicate that accompanying material is what follows. Which is exactly what \$e means, so it's a piece of punctuation that could be omitted.

**Another case of transposed punctuation: Dr. Strangelove \$b , or, How I stopped worrying .... Correct?**

Answer: Alternative titles go in \$a. So, as a result, the commas that you put around "or" in that case would all be in \$a and is punctuation that would be retained. You would also create a 246 with the other title information.

**The record examples are 'old' records with punctuation removed for the slides. Can you provide OCLC numbers for records that were created using this standard?**

Answer: Sure, we can add a couple of current examples to the slides. If you really want to look at some records quickly, the Germans, with German language of cataloging, have been using records with no punctuation for quite a while.

**The most current says OCLC Macrobook 2019. Is that the version that includes the punctuation macros?**

Answer: That is the most current one. It was modified at the end of last year in preparation for the implementation by PCC. It was released in December, which is why it is labeled 2019. If we put out another one to revise those, which we probably will do sometime this year, we will widely publicize that and it will be labeled 2020. Address to get the macros: [https://help.oclc.org/Librarian\\_Toolbox/Software\\_downloads/Cataloging\\_software\\_downloads](https://help.oclc.org/Librarian_Toolbox/Software_downloads/Cataloging_software_downloads).

**Our current ILS supplies the commas in the main or added entries if the person has two relator terms so these now show 2 commas (i.e. director,, producer). How long do you think it will take ILS's to catch up and supply the punctuation to make the display more patron friendly? Without the display of the delimiter and codes it's difficult to read.**

Answer: It sounds like your ILS supplier is already providing commas and that is clashing with records that have commas embedded in them. If those commas weren't there, you would have a single comma rather than two. Of course how long it will take for local systems to catch up is up to whoever sells that system. If they heard from their users they would be more inclined to make changes rather than if they heard nothing from their users.

**What is your advice for removing punctuation from enhanced 505s?**

Answer: Field 505 is kind of a problem. In the macro that we put together, we skipped removing punctuation from field 505. In part because in an enhanced 505 field, you could potentially have \$g which can represent a lot of different things. If it's a sound recording record, \$g may contain the playing time, the duration to a piece of music. In the context of a book record, the \$g might indicate the volume number. So, it's unclear what should happen if you have a 505 field that just contained subfield codes, what punctuation would be needed for display. This may be a case where the MARC format ought to be modified to make a clearer distinction between how some of these things are used when it comes to field 505.

**Topic comments:**

**Comment: This looks like Anglo-American Cataloging Rules from the 1960's and 70's.**

Response: If you are thinking in terms of it looks a lot like records before ISBD punctuation came along, I would say that's true. But those rules from that era are more likely to include commas and colons as just separators between elements where, in the case where you are doing minimal punctuation or records without punctuation, you end up with coding only with no punctuation included.

**Comment: We've made the decision to keep using ISBD punctuation in records in our local database because the display in our PAC is ugly /confusing if punctuation is omitted.**

Response: That is understandable, and is usually what drives the decision that libraries make about this issue.

**Comment: For these punctuation records it will be interesting to study the Discovery display that OCLC makes (in Record Manager when editing use menu Record / View in WorldCat Discovery).**

Response: Just as is the case with local systems, there is a need to make changes to Discovery to better display records that lack punctuation. Of course, the German records have already been mentioned, which we have been loading for many years. They lack punctuation and they may be displayed less than perfectly in the Discovery. We have been working with our Discovery colleagues about the kinds of things that may need to be done in an environment where records lack punctuation.

**Comment: It appears that these guidelines make the assumption that the default meaning of 245 subfield \$b is "other title information", and that any programming to supply punctuation in a display will have to look at the content of the subfield \$b to determine if it's starting out with a different mark of punctuation, to prevent an erroneous space-colon-space being added.**

Response: That's true, it will have to do that. We modeled, within PCC, the practice of relocating the equal sign and the semi-colon for the two specialized cases following the practice that had already been set in place by the Germans. It didn't make sense to us to somehow handle it differently. Along the way, there had been the question about if we are retaining two pieces of punctuation shouldn't we maybe retain all three. It shouldn't be that problematic for a program to look at the content that it is displaying and see that there is already an equal sign here, as the first character in \$b, therefore the inclusion of a colon preceding \$b is not needed.

**General questions:**

**Is OCLC working with ExLibris to allow cataloging functions directly in WorldCat from the Alma interface? Can you do the same things as Connexion?**

Answer: We do not have knowledge if that is happening or not, so we can't really comment. That would be a question to send to OCLC Customer Support, as a starting point.