

August 14, 2019

# Virtual AskQC Office Hours

## OCLC cataloging policies: an overview of Bibliographic Formats and Standards

**OCLC Metadata Quality**



## Housekeeping

- This session is being recorded



# Housekeeping

- This session is being recorded
- All session recordings, slides, and notes are available at [oc.lc/askqc](https://oc.lc/askqc)

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### Previous AskQC office hours

Last updated: 04/10/2019

#### May 8, 2019 :: Small errors with big consequences

- Video recording
- Presentation slides

#### April 10, 2019 :: An overview of OCLC training resources

- Video recording
- Presentation slides
- Summary and member questions

#### March 13, 2019 :: Intro to the Virtual International Authority File (VIAF)

- Video recording
- Presentation slides
- Summary and member questions

Table of contents

1. May 8, 2019 - Small errors with big consequences
2. April 10, 2019 - An overview of OCLC training resources
3. March 13, 2019 - Intro to the Virtual International Authority File (VIAF)
4. February 13, 2019 - Provider metadata cataloging
5. January 9, 2019 - When to input a new record
6. November 14, 2018 - How the OCLC MARC update process works
7. October 10, 2018 - Register record and improve cataloging
8. September 12, 2018 - Meet Metadata Quality
9. June 27, 2018 - What is the expert community?
10. May 20, 2018 - Bibliographic record validation
11. April 25, 2018 - URLs in a shared cataloging environment
12. March 26, 2018 - Processing change requests
13. February 28, 2018 - Cataloging

## Housekeeping

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- After the session you will be directed to a quick, optional survey

Virtual AskQC Office Hours  
feedback survey

Please take a moment to provide feedback on today's office hour session. The responses are for informational purposes only and optional. Thank you for attending today's session!

1. Did you find today's session useful?

Yes  
 No  
 Sort of

2. Why did you choose the answer you did in question 1?

Enter your answer

3. Are there topics you would like us to cover in the future?

Enter your answer

## On the call today



Laura  
Ramsey  
Sr. Metadata  
Operations  
Manager

Robin Six  
Database  
Specialist II

Shanna  
Griffith  
Database  
Specialist II

Patty Treboni  
Database  
Specialist II

Robert  
Bremer  
Sr. Consulting  
Database  
Specialist

Jay Weitz  
Sr. Consulting  
Database  
Specialist

Charlene  
Morrison  
Database  
Specialist II

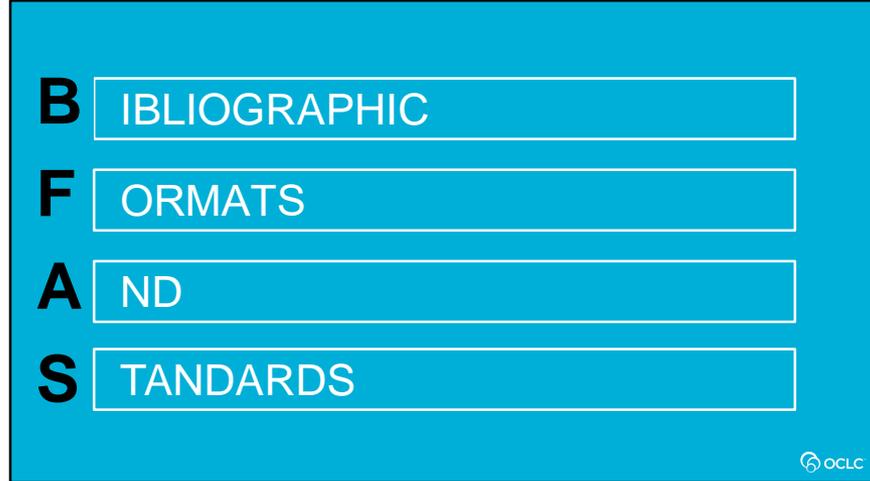
## BFAS OVERVIEW



**GO SLOW!!!!**

Hello and welcome. This is Shanna and today I'm joined by my colleague Robin Six. We are going to provide an overview of BFAS and share some information about OCLC cataloging policies.

**PAUSE ...** Wait for next slide to show



So, what is BFAS? BFAS stands for Bibliographic Formats and Standards.  
**[NEXT SLIDE]**

## **Bibliographic Formats and Standards (BFAS)**

- Guide to coding practices and input standards
- How MARC21 is applied to WorldCat
- Assist catalogers



It is OCLC's guide to coding practices and input standards used in bibliographic records in WorldCat

WorldCat being a shared environment, BFAS is how MARC21 is applied to WorldCat

And it is designed to assist cataloger's and other technical services staff making use of bibliographic records in WorldCat

## Ways to Access

- Directly via [oc.lc/bfas](https://oc.lc/bfas)
- Within Connexion client, Record Manager, and Connexion browser



There are multiple ways to access BFAS, whether directly through [oc.lc/bfas](https://oc.lc/bfas) or from within Connexion Client, Record Manager, or Connexion Browser.

## Connexion client (Fixed Field Element)

OCLC Connexion - [Pinned] Online WorldCat: Fragmentary Republican Latin

File Cataloging Authorities Edit Action Batch View Tools Window Help OCLC Merge

OCLC 1017752228 No holdings in OCLCQ - 343 other holdings  
No OCLCQ holdings in GLIMIR cluster; 345 other holdings in GLIMIR cluster of 2

Books	Rec stat	c	Entered	20180104	Replaced	20190805131426.7					
Type a	ELvl		Src	c	Audn		Ctrl		Lang	eng	
BLvl	m	Form		Conf	0	Blpg		MRec		Ctry	mau
		Cont	b		GPub		LitF	0	Indx	1	
Desc	i	Ills			Fest	0	DtSt	m	Dates	2018	, 9999

OCLC

From the Client alone, there are several ways to access BFAS. Information about a Fixed Field Element can be found by clicking on the linked Fixed Field Element itself which will display that element's page within BFAS in a separate window.

## Access - Connexion client (Variable fields)

The screenshot shows a library catalog interface with a MARC record for 'Texts (select fragments) of the works of Quintus Ennius in Latin, with English translations on facsimile pages; introduction and notes in English.' The record is displayed in a table format with fields 440, 504, 500, 520, 600, 650, 800, and 651. A right-click context menu is open over the 500 field, with 'MARC Field Help' selected. A separate browser window is open in the background, displaying the MARC Field Help page for the 500 field.

Right clicking within the chosen variable field and selecting MARC Field Help from the drop-down list will also display that page in a browser window.

## Access - Connexion client (Help menu)

The screenshot shows the OCLC Connexion client interface. At the top, there is a search bar with the text '1017792228' and a dropdown menu showing 'No OCLCO holdings in OCLCO - 349' and 'No OCLCO holdings in GLIMM'. Below the search bar, there is a list of fields with their corresponding values. The field '245' is selected, and a 'Help' menu is open, showing 'MARC Field Help' as the selected option. The interface also includes a 'GLIMM cluster of 2' button and a 'Help' button. The main content area displays the MARC record details for the selected field, including the title, author, and a detailed description of the work.

264 4 \$c I2018:  
300 -S- volumes : 4c 17 cm  
336 text \$b txt \$2 rdacontent  
337 unmediated \$b n \$2 rdamedia  
338 volume \$b n \$2 rdacarrier  
480 1: Loeb classical library. #v 284. 537. 543. 541. 542  
245 1 Facts (select fragments of the works of Quintus Ennius) in Latin, with English translations on facing pages, introduction and notes in English.  
504 Includes bibliographical references and indexes.  
505 0 \$g 1. \$t Testimonia. \$f Epic fragments. \$f Ennius -- \$g 1. \$f Dramatic fragments. \$f Minor works. \$f Ennius -- \$g 1. \$f Oratory. \$f Edited and Translated by Gaius Manuuius (3 volumes).  
520 "Quintus Ennius (239-169 BC), widely regarded as the father of Roman literature, was instrumental in creating a new Roman literary identity and inspired major developments in Roman religion, social organization, and popular culture. Brought to Rome in the entourage of Cato, Ennius took up residence on the Aventine and, fluent in the native Oscan as well as Greek and Latin, became one of the first teachers to introduce Greek learning to Romans through public readings of Greek and Latin texts. Best known for domesticating Greek epic and drama, Ennius also pursued a wide range of literary endeavors and found success in almost all of them: His tragedies were long regarded as classics of the genre, and his Annals gave Roman epic its canonical shape and pioneered many of its most characteristic features. Other works included philosophical works in prose and verse, satirical poems, dramas on Roman themes (praetextae), and occasional poetry that informed the later development of satire. This two-volume edition of Ennius, which inaugurates the Loeb series Fragmentary Republican Latin, replaces that of Warmington in *Remains of Old Latin*. Volume 1 and offers fresh texts, translations, and annotation that are fully current with modern scholarship."--Publisher's description.  
600 1 0 Ennius, Quintus.  
650 0 Latin literature \$x Translations into English.  
650 0 Latin language. Textual--to ca. 100 B.C.  
600 1 7 Ennius, Quintus. \$2 text 40 (DCLC,CJ#00043097

With the field selected, you can drop down the Help menu at the top and select MARC Field Help from the drop-down list. The page for that field in BFAS will display in a browser window.

You'll notice that there also a default shortcut key given (Shift + F1), which can be used with the field selected.



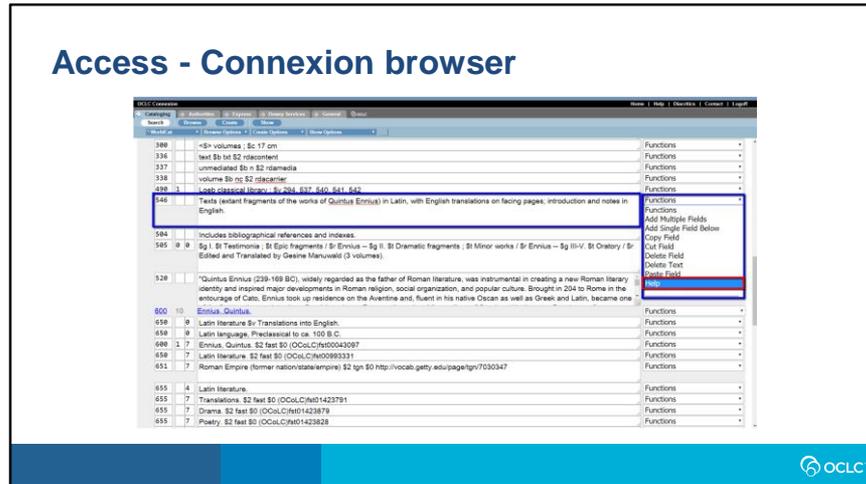
## Access - Record Manager



The screenshot displays the Record Manager interface for record ID 101775229. The interface includes a top navigation bar with tabs for 'quisitions', 'Licenses', 'Circulation', 'Analytics', and 'Admin'. Below the navigation bar, there are buttons for 'Print', 'Edit', 'Record', 'Advanced Action', and 'Save'. The main area shows a list of records with columns for 'Field', 'Value', and 'Action'. Record 546 is selected, and a context menu is open over it, showing options like 'Field Help', 'MARC Field Help', 'Field', 'Apply Authority Data', 'Controlled Heading', and 'Transliterate'. The 'Field Help' option is highlighted, and a separate window is open showing the 'Field Help' for 'Quintus Ennius (2)'. The 'Field Help' window contains detailed information about the field, including a 'MARC Tooltip' and a 'Field Help' section.

In Record Manager, you would right click within the field, select Field Help, and then MARC Field Help. The page for that field in BFAS will display in a separate window.

## Access - Connexion browser



In Connexion Browser, you would drop down the Functions list that is beside the field that you want information about, and then select Help. The page for that field in BFAS will display in a separate window.

## BFAS INTRO CHAPTERS



The introduction chapters of BFAS provide a wealth of information, cataloging guidelines, and resources.

In fact several of the Virtual AskQC Office Hours sessions have covered topics for which guidelines can be found in these intro chapters.

## Chapter 1: Introduction

- MARC bibliographic records
- WorldCat bibliographic records
- Cataloging documentation



In chapter 1 you will find the parts of a MARC record and how they identify how data is indexed and displayed in WorldCat. It explains what WorldCat Bibliographic Records are, provides the definition to terms that are used throughout BFAS, such as Input Standards, and gives a list of cataloging documentation that is referenced throughout the document.

## Chapter 2: Online cataloging

- Original cataloging
- Transcribing cataloging copy
- Character set



Chapter 2 provides instructions on general cataloging practices within WorldCat, including original cataloging (creating bibliographic records), transcribing cataloging copy, and character set.

This chapter has undergone a major overhaul, which Robin will go into more detail about in a moment.

## Chapter 3: Special cataloging guidelines

- Photocopies and Print-on-Demand reproductions
- Electronic resources
- Theses and dissertations



In chapter 3 you will find instructions for cataloging practice and special materials, such as photocopies/print-on-demand, electronic resources, and theses and dissertations.

Like chapter 2, this chapter has also recently undergone a major revision for which Robin will provide more detail about.

## Chapter 4: When to in put a new record

- Create a new record or not? ... that is the question
- Field-by-field guidelines



Chapter 4 provides guidelines when deciding whether to use an existing record or to enter a new one. It includes guidelines for each field in a record and if an absence, presence, or difference would justify a new record to be created.

## Chapter 5: Quality assurance

- Member capabilities
- National cooperative programs
- Requesting changes to records

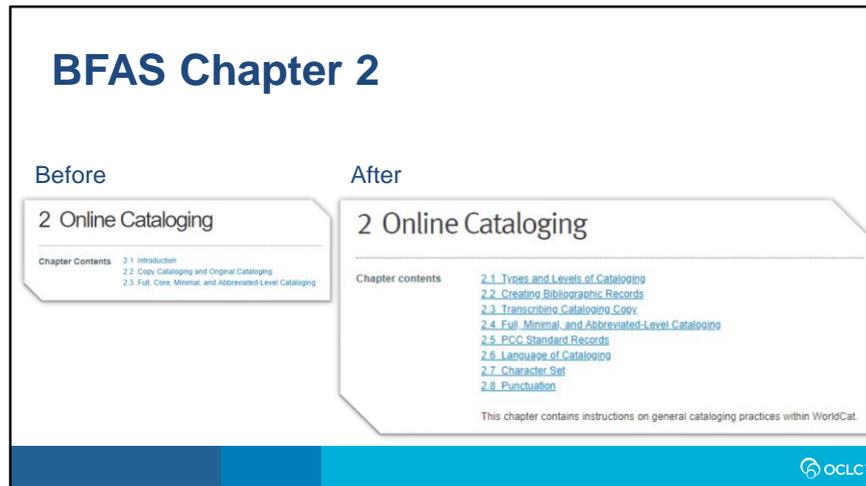


In chapter 5 you will find guidelines for member capabilities for modifying existing records, explains the various national cooperative programs such as BIBCO and CONSER, and the various methods to report errors and duplicates.

## BFAS ... A WORK IN PROGRESS



I will now pass it over to Robin who will talk about some of the major changes recently made to BFAS.



Here is a side-by-side view of the contents of Chapter 2 before and after our revisions.

You can see this chapter has been fleshed out and now covers the online cataloging topics in more detail.

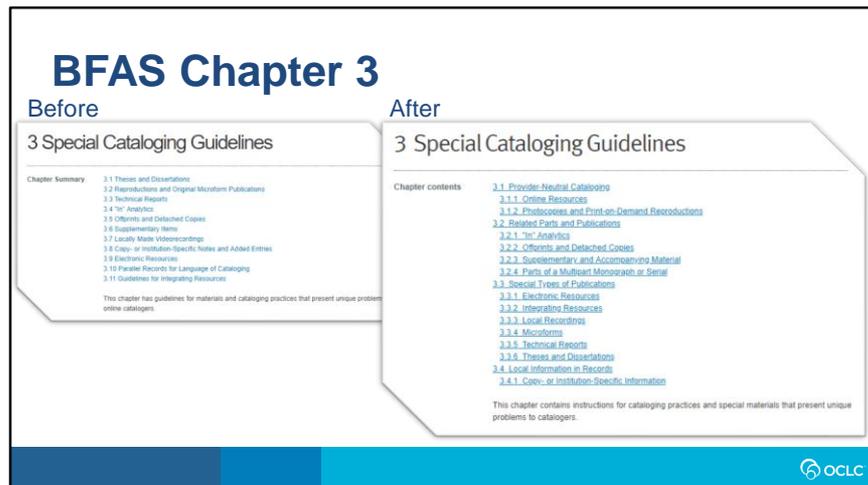
For instance, Section 2.1 defines and explains the 3 types and 3 levels of cataloging. The next 2 sections cover creating new bibliographic records and transcribing cataloging copy in more detail.

Section 2.4 covers the 3 levels of cataloging in more detail.

Section 2.5 explains what PCC standard records are and their guidelines. And in case anyone doesn't know what PCC stands for, it is the Program for Cooperative Cataloging.

We moved the section Parallel records for language of cataloging from Chapter 3 to Chapter 2, renaming it Language of cataloging, updating the topic of parallel records and hybrid records as well as the examples.

And finally, we added detailed sections for Character set information and Punctuation.



Moving on the chapter 3, you can see we grouped related topics together under 4 main categories.

Provider-neutral cataloging covers both online resources , photocopies and print-on-demand reproductions.

In analytics, offprints and detached copies, supplements and accompanying material, and parts of a multipart monograph or serial have been brought together under the topic Related Parts and Publications.

Under Special Types of Publications the topics: electronic resources, integrating resources, local recordings, microforms, technical reports, and theses and dissertations are covered.

The final section provides guidance on the different methods and fields for adding copy- or institution-specific information to records.

## WHERE TO FIND INFORMATION YOU HAVE ASKED ABOUT



We want to thank everyone who has submitted questions and topic suggestions for our Virtual AskQC Office Hours sessions, either through email or in survey responses following these sessions.

Suggestions are compiled and reviewed so we can try to tailor these sessions to be what you would like to learn more about.

And as today's topic is BFAS, we'd like to point out where in this document you might find some of the specific topics we have been asked about since starting these sessions.

## BFAS Chapter 5 - Quality Assurance

- Enhancing or not enhancing PCC records
- Upgrading level 8 and M records
- When/how to report errors
- When we remove records from WorldCat



Along with the changes to chapters 2 and 3, we have also completely revised Chapter 5.

Information about the Program for Cooperative Cataloging and PCC records in WorldCat is located in this chapter. Section 5.1 covers the different cataloging programs under the PCC umbrella.

What edits you can make to PCC records, non-PCC records, cataloging in publications or CIP records is covered in section 5.2, Member capabilities.

Everything you ever wanted to know about reporting errors, record changes, or merge requests can be found in section 5.5 Requesting Changes to Records.

This is also where you will find the topic Deleting records, where we list the categories of records which can be requested to be deleted.

And an overview of WorldCat Metadata Quality staff activities is covered in section 5.4.

## Connecting the dots ...

- Chapter 2: Online cataloging
  - 2018-10-10 VAOH session: Parallel records and language of cataloging
- Chapter 3: Special cataloging guidelines
  - 2019-02-13 VAOH session: Provider neutral cataloging
- Chapter 4: When to input a new record
  - 2018-02-28 VAOH session: Cataloging defensively with edition statements
  - 2019-01-09 VAOH session: When to input a new record
- Chapter 5: Quality assurance
  - 2018-03-28 VAOH session: Processing change requests
  - 2018-06-27 VAOH session: What is the Expert Community?



As I mentioned earlier, some of the past Virtual AskQC Office Hours sessions have covered topics found in the Introduction Chapters. This slide provides a list of those sessions.

For instance, the session in June of last year discussed the Expert Community. Chapter 5: Quality Assurance is where you can find the guidelines for the Expert Community.

The session in February of last year discussed cataloging defensively with edition statements. Chapter 4: When to input a new record provides guidelines on the differences in edition statements that would and would not justify creating a new record.

## “Cataloging Defensively” presentations

- “Cataloging Defensively” - <https://www.oclc.org/en/events/cataloging-defensively.html>
- Virtual AskQC Office Hours – [oclc.org/askqc](https://oclc.org/askqc)



If you are unfamiliar with the cataloging defensively concept, please see the link on the slide for background information about this and the various presentations that our colleague Jay Weitz has put together.

Of course, [oclc.org/askqc](https://oclc.org/askqc) will take you to the page where the Virtual AskQC Office Hours sessions are listed with access to the recordings, presentation slides, and Q&A notes.

This concludes our presentation and we will now open it up to any questions you have on BFAS. Thank you.

## Questions?



Laura  
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Manager

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Database  
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Shanna  
Griffith  
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Specialist II

Patty Treboni  
Database  
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Robert  
Bremer  
Sr. Consulting  
Database  
Specialist

Jay Weitz  
Sr. Consulting  
Database  
Specialist

Charlene  
Morrison  
Database  
Specialist II

**Please submit questions through chat**



## Thank you!

Send cataloging policy questions  
at anytime to:  
[askqc@oclc.org](mailto:askqc@oclc.org)

Session links available at:  
[oclc.org/askqc](https://oclc.org/askqc)

### Next Virtual AskQC Office Hours:

Topic: WorldCat knowledge base quality  
Wednesday, September 11, 2019  
1:00 PM Eastern  
Registration available at [oclc.org/askqc](https://oclc.org/askqc)

Because  
what is  
known must  
be shared.®

