Virtual AskQC Office Hours
OCLC cataloging policies: an overview of Bibliographic Formats and Standards

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• After the session you will be directed to a quick, optional survey
On the call today

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Sr. Metadata Operations Manager

Robin Six
Database Specialist II

Shanna Griffith
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Database Specialist II
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.
There are multiple ways to access BFAS, whether directly through oc.lc/bfas or from within Connexion Client, Record Manager, or Connexion Browser.
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.
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.
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.
Also from the Help menu, BFAS can be accessed by choosing Useful Web Links from the drop-down list and then selecting Bibliographic Formats and Standards. However, keep in mind that this path will display the main page for BFAS and not the field that is selected in the record.
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.
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.
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.
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.
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 input 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.
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.
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.
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.
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.
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.
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, oc.lc/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?

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Please submit questions through chat
Thank you!
Send cataloging policy questions at anytime to:
askqc@oclc.org

Session links available at:
oc.lc/askqc

Next Virtual AskQC Office Hours:
Topic: WorldCat knowledge base quality
Wednesday, September 11, 2019
1:00 PM Eastern
Registration available at noc.lc/askqc