Virtual AskQC Office Hours

OMG, there are so many 5XX fields, what do I do?

OCLC Metadata Quality
November 2020

Housekeeping

This session is being recorded

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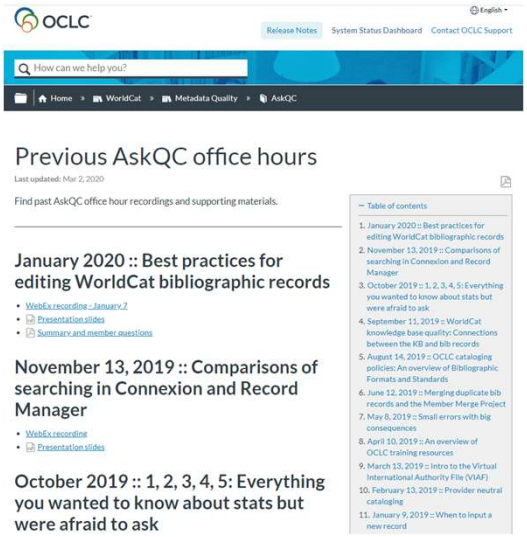

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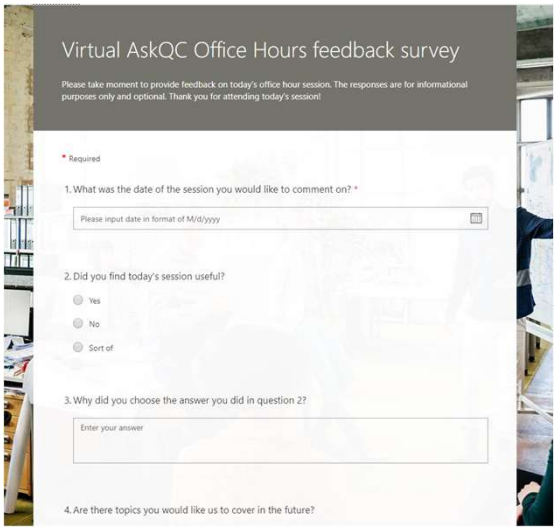
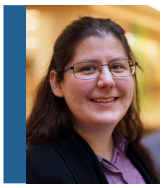
After the session, you will be directed to a brief, optional survey



On the call today



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5XX fields: Part 1

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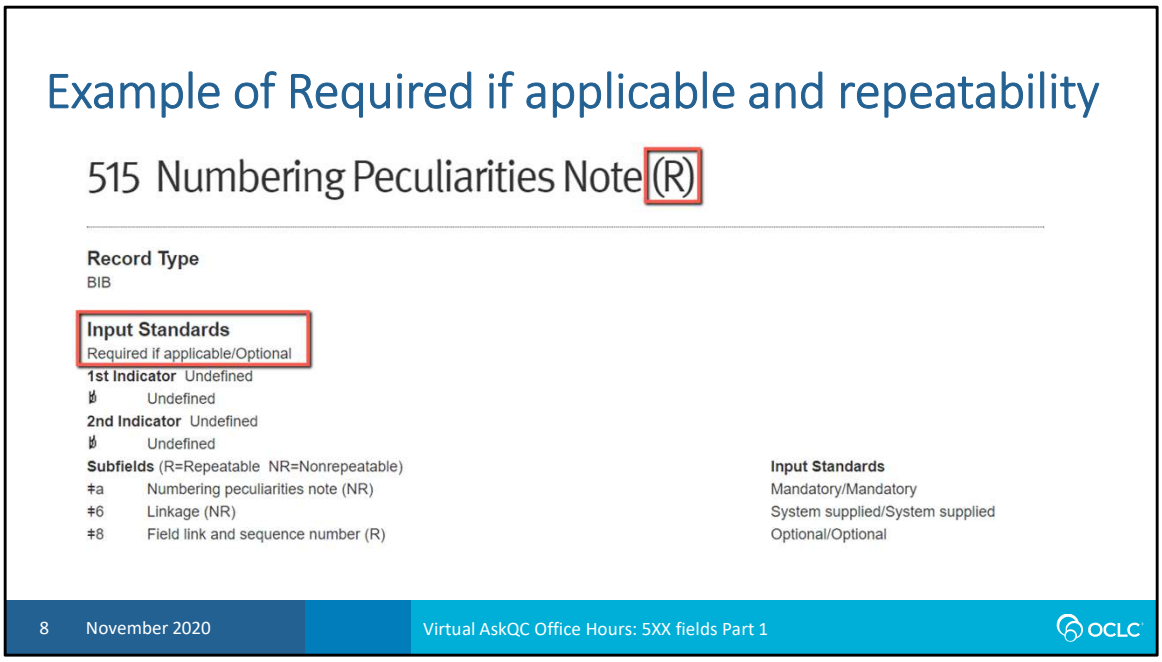
There are so many 5XX fields! When preparing for this presentation, we realized we could not cover all of them in the time allotted.

What we will cover today

- MARC 5XX Required if applicable fields: 500, 501, 502, 504, 508, 511, 513, 515, 518, 525, 526, 532, 533, 534, 538, 545, 546, 547, 550, 555, 580, 588
- Required if applicable for full level records
- "Required if applicable" means you need to use this field if it applies to the manifestation you are cataloging for a full level record
- Saving MARC 5XX Optional fields for Part 2

So, we decided to cover only the Required 5XX fields, which are listed in the first bullet here. We will save the Optional 5XX fields for a Part 2, which we'll offer sometime next year.

A definition of what we mean by required seems in order. Within *Bibliographic Formats and Standards*, each field and subfield has a listing of whether it is required if applicable or optional. This is shown for both full and minimal level. So, we are covering the required 5XX fields for full level records. And, they are required *if applicable*, meaning you use them when they apply to the manifestation you are cataloging. So, you won't use these fields unless they are pertinent or applicable to what you are cataloging.



Here is a screenshot of how each of these 5xx fields are showcased in Bibliographic Formats and Standards. The MARC tag number and the name of the note field will contain an R next to it to if it is repeatable. All the notes that will be discussed today are repeatable. Below record type you will see the Input standards which indicates when a note is “Required if applicable”.

500 – General Note

- Provides general information for which a specialized note has not been defined
- Example: **500 _ _ $a Includes index.**
- Does not transfer when records are merged

The 500 field is a catch all for all types of information such as bibliographic history or physical description enhancements, which cannot be put in another specialized note. For rare and special collection materials, you can use field 500 for copy-institution specific information that have scholarly or artistic value beyond the local institution, you can read more on these types of notes in 3.4.1 of Bibliographic Formats and Standards titled Copy-or Institution Specific Note and Added Entries. The indicators are not defined in this field. For merging and overlay functions in OCLC it does not transfer.

501 – With Note

- Indicates that more than one bibliographical work is contained in the physical item at the time of publication, release, issue, or execution
- Example: **501 _ _ $a On reel with: They’re in the Army now.**
- We do not merge if one record has a 501 and other does not

The 501 field indicates that more than one bibliographical work is contained in the physical item at the time of publishing, release, issue, or execution. The works that are contained in the item usually have distinctive titles and lack a collective title. In WorldCat, the use of field 501 is primarily for resources as they were originally published, released, issued, or executed. Generally, do not use this field with subfield 5 in WorldCat for resources bound together locally, there are exceptions when cataloging rare and special collection materials and other formats. For example:

Motion pictures, video recordings, and filmstrips, the note indicates that two or more distinct titles are presented on the same reel or strip or contained in the same cassette.

Cartographic materials, this field may be used when the title and statement of responsibility area contains a title that applies to only part of an item that lacks a collective tittle.

We do not merge potential duplicate records if one record has a 501 field and the other does not, unless there are 7xx or other fields representing the works in the 501 field.

502 – Dissertation Note

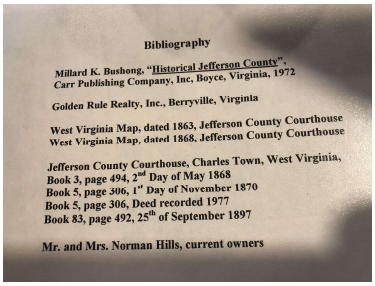
- Gives the designation of an academic dissertation or thesis and the institution to which it was presented
- Example: **502 _ _ $b Ph. D. $c University of Louisville $d 1997**
- Does not transfer when records are merged
- Thesis icon for WorldCat Discovery and WorldShare must have this field present in the bibliographic record

You may use field 502 with either a single subfield ǂa or separate subfields ǂb, ǂc, ǂd, and/or ǂg (as shown in this example). It's preferred to use multiple subfields to provide the level of detail specified by RDA instructions. Do not use subfield ǂg to record academic units, advisors, or field of study. Instead, add captioned notes in field 500. The field of study should be included in the subfield ǂb only if it is an integral part of the degree name, otherwise record it in field 500.

For those who use WorldCat Discovery or WorldShare, field 502 must be present to generate the thesis icon for these systems.

504 – Bibliography, Etc. Note

- Contains the bibliography, discography, filmography, webliography, and/or other bibliographic references of a resource
- Example: **504 _ _ $a Discography: pages 105-111.**
- Does transfer when records are merged



"Bibliography of Fairview notes" by Pilgrimfoot is licensed under CC BY-SA.4.0

Field 504 contains the bibliography, discography, filmography, webliography, and/or other bibliographic references of a resource.
Use this field also to indicate the presence of a bibliography, etc., in accompanying material that is described in the record. For multipart items, including serials, the note may pertain to all parts or to a single issue or part.

For regulations, statutes, and tables of cases, use field 500 rather than 504. Also use field 500 if a note mentions contents in addition to the bibliography and the bibliography is not deemed sufficiently extensive to warrant a separate note.

For current cataloging do not input square brackets around unnumbered pages or leaves.

508 – Creation/Production Note

- A note about the credits for individuals or organizations (other than members of the cast) who have participated in the artistic or technical production of the work to a significant degree
- Example: **508 _ _ $a Camera, Steve Yedlin ; editors, Lee Percy, Nancy Richardson ; music, Marco Beltrami ; production design, Carol Spier.**
- Does transfer when records are merged

Photo by Jakob Owens on Unsplash

Field 508 is used for notes containing the names of persons or organizations, other than members of the cast, who have participated in the creation and/or production of the work.

Field 508 is used primarily for videorecordings.

For serials, designations (usually dates) may be given to show the span of issues for which the person or organization was associated with the production.

511 – Participant or Performer Note

- A note about the participants, players, narrators, presenters or performers
- Example: **511 0_ $a Christoph Prégardien, tenor ; Michael Gees, piano.**
- Does transfer when records are merged

Photo by Fitsum Admasu on Unsplash

Field 511 is used for information about the participants, players, narrators, presenters, or performers.

The participant or performer note is sometimes displayed and/or printed with an introductory term or phrase that is generated as a display constant based on the first indicator.

513 – Type of Report and Period Covered Note

- Information about the type of report and the period covered
- Example: **513 _ _ $a Quarterly technical progress report; $b January-April 1, 1977.**
- Does not transfer when records are merged

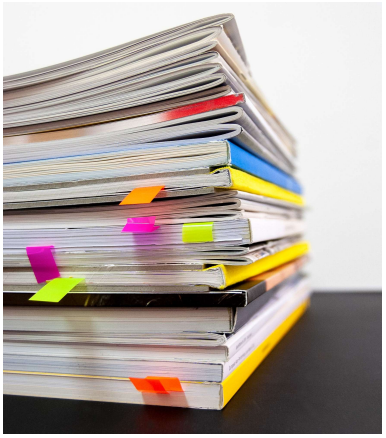


Photo by Bernd Klutsch on Unsplash

Field 513 contains a note that provides information on the type of report and the period covered by the report. For serials, only subfield $a is usually given.

515 – Numbering Peculiarities Note

- An unformatted note giving irregularities and peculiarities in numbering or publishing patterns. Use also to show that a publication is issued in parts or revised editions or to express report year coverage
- Example: **515 _ _ $a Some issues published out of chronological sequence.**
- Does not transfer when records are merged

Field 515 contains an unformatted note giving irregularities and peculiarities in numbering or publishing patterns. It may also be used to show that a publication is issued in parts or revised editions, or to express report year coverage.
Irregularities or peculiarities in numbering, include:

- Double numbering.
- Combined issues or volumes.
- Confusion in the use of series numbering or multiple numbering systems.
- Publication of preliminary issues not included in the regular numbering.
- Numbering that does not begin with volume one.
- Publications issued in parts or revised editions.

518 – Date/Time and Place of an Event Note

- A note on the date/time and/or place of broadcast, capture, or creation associated with an event. Use to include the date/time and/or place of broadcast, execution, filming, recording or, in the case of a naturally occurring object, of finding
- Example: **518 _ _ $a 1st film $o filmed $d 2013 February $p Minnesota.**
- Does not transfer when records are merged

Photo by Ales Krivec on Unsplash

Capture information provides information about the recording, filming or broadcasting of a manifestation. Information may be taken from any source. Capture information is recorded in MARC field 518 (either as a formatted or unformatted statement). Capture information can also be recorded in coded form in an associated MARC field 033.

You may use field 518 with either a single subfield ǂa or multiple subfields: ǂd, ǂo, and ǂp.

Regardless of the choice of subfield practice (single ǂa or multiple subfields), follow MARC 21 input conventions, which specify a period at the end of the field.

If using multiple subfields, punctuation separating elements is omitted.

525 – Supplement Note

- Information on the existence of supplements or special issues that are neither cataloged in separate records nor recorded in a linking entry field 770 (Supplement/Special Issue Entry)
- Example: **525 _ _ $a Some issues accompanied by separately paged supplements and sections consisting principally of convention proceedings and lists of members and branch societies.**
- Does not transfer when records are merged

A note used to record any supplements or special issues that are neither cataloged as separate records nor recorded in linking entry field 770. Use primarily for unnamed supplements or special issues. Named supplements that are not cataloged on a separate record may also be mentioned.

Generally, this note field is used *only* for unnamed supplements and/or special issues.

526 – Study Program Information Note

- Note giving the name of a study program which uses the title described in the record. Details about the study program data elements are also contained in the field
- Example: **526 0 _ $a That's A Fact, Jack! $b 5.5 $c 4.5 $d 100.**
- Does transfer when records are merged

Field 526 provides the name of a study program which uses the title described in the record. Use field 526 primarily for formal curriculum-based study or reading programs.

Field 526 should be used to record programs of interest at the national or regional level. If the note is about a local level program, use field 590 or field 599. Alternatively, you may edit field 526 locally.

532 – Accessibility Note

- Textual information on accessibility details for an item for people who might need accommodation of some sort
  - Closed captioning or sign language information
  - Special equipment or software needed to provide accessibility
  - Deficiencies in accessibility (particularly for media)
- Example: **532 1 _ $a Described video.**
- Example: **532 1 _ $a Signed in American Sign language.**
- Does not transfer when records are merged

Creative Commons

Cynthia: The accessibility note is used most often with media rather than with print items. It provides information about what accommodations are present to help those who are visually or hearing impaired. It can also describe deficiencies in accessibility, such as other special equipment that must be used in conjunction with the item to make it accessible.
The first indicator value brings this out:
0 is used for Accessibility technical details; 1 is used for Accessibility features; 2 is used for Accessibility deficiencies or 8 is used if it doesn't fit those 3 categories.

532 is a relatively new field; Sign language notes now go here rather than in the 546 field language notes, where they previously would have been tagged.

533 – Reproduction Note

- Used when describing the original resource in the main description, but cataloging a reproduction, such as microform
- Example: **533 _ _ $a Microfiche. $b Springfield, Va. : $c National Technical Information Service, $d 1984. $e 1 microfiche : negative.**
- AACR1 cataloging practice in widespread use by Library of Congress
- Transfers when records are merged under specific circumstances

Th 533 reproduction note is now used mainly for microforms. It is not used for electronic or online reproductions cataloged according to provider neutral guidelines except for digital preservation copies.
The practice of describing the original item in the main description and using a reproduction note to specify that the item is not the original format but a reproduction is an AACR1 practice, that is, pre-AACR2. This is a practice that the Library of Congress decided to continue, and most others within the US followed. Other national libraries, such as the Library and Archives Canada do not use this practice, but instead describe the microform in the main description following AACR2 and RDA.

There are special sections in BFAS Chapter 3 on cataloging practices for Microforms and for Photocopies and Print-on-Demand Reproductions which are useful in guiding one to current practices for those items.

So, *required if applicable* in this case applies only if you are following a policy of describing the original in the main description and noting the fact that the item is a type of reproduction in a note.

Regarding the special circumstances for field ransfer: This field only transfers when records are merged if the 042 code "dlr" is present.

534 – Original Version Note

- Used when a reproduction, usually a print item, is described in the main description; this note gives information on the original publication when details differ between the reproduction and original
- Example: **534 _ _ $p Originally published: $b 1st ed. $c New York : Harper & Row, 1972.**
- Does not transfer when records are merged

The 534, original version note, is used most often when cataloging a reprint and information differs between what you are cataloging and the original version. You use this note when you are aware of this information or it is noted in the publication. This isn't something you need to go to great lengths to search for just to add this note. Subfield p is required and is always the first subfield. It introduces the citation of the original. Possible phrases for subfield p include: Original version, or Reprint of, or Originally published, as you see in the example on this slide.

538 – System details note

- Technical information about the item; often used for media cataloging
- Example: **538 _ _ $a System requirements: Adobe Flash Player or Adobe Integrated Runtime.**
- Transfers when records are merged
- May be added to PCC records when editing

This is a note you've seen used frequently for cataloging software or sound recordings or visual materials. It often has "System requirements" as the first part of the note, but that wording is not a requirement. It is often used to specify that a Blu-ray player is needed for a Blu-ray disc, or that a particular gaming console is needed to run the software.

Advice from RDA Recording Equipment or System Requirements (3.20.1.3)
Record any equipment or system requirements ***beyond what is normal and obvious for the type of carrier or type of file***. Record requirements such as the make and model of equipment or hardware, the operating system, the amount of memory, programming language, other necessary software, any plug-ins or peripherals required to play, view, or run the resource, etc.

A URL can be included in a subfield u that would lead you to technical details about the item.
Also note that this field may be added to PCC records when editing a WorldCat record.

545 – Biographical or Historical Data

- Biographical or historical information about an individual, institution, or event used as the main access point (1XX field)
- Example: **545 _ _ $a Author and reformer. Born Harriet Elizabeth Beecher. Married (1836) Calvin Ellis Stowe (1802-1886).**
- Does not transfer when records are merged

Photo of Harriet Beecher Stowe in public domain

This field is rarely used, so I was surprised to find out that we list it as required in BFAS. I think we may want to reconsider this and make it optional. Most of the time, data of this type would now be recorded in an authority record. However, it can be useful if something is important that cannot be brought out in other ways in the record or in an authority record. All of the examples we have in BFAS come straight out of the MARC standard documentation. I think use of this field is most common for describing information about archival collections or special materials.

546 – Language Note

- Textual information on the language, notation system, or script used in the content of the materials described
- Example: **546 _ _ $a In Bulgarian; summaries in English and Russian.**
- Example: **546 _ _ $a Mongolian; ǂb Cyrillic alphabet.**
- Transfers when records are merged
- May be added to PCC records when editing

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This language note is very helpful to provide complex information that may be coded elsewhere in the record into textual form to provide a description for the end user. It is usually added to the record when something is complex, and involves multiple languages or is not apparent elsewhere in the description. If there is only one language, and that is clear from the title or the description, this note is usually not used. Information about scripts goes in subfield b, as you can see from the seconde example.

While on this slide, I'd like to note that transfer information. When DDR, OCLC's Duplicate Detection and Resolution software merges duplicate records the 546 field will transfer to the retained record if no 546 field is already present. However, if the retained record has this information in a 500 field or general note, the retained record will then have 2 notes with similar information, one tagged as a 500 general note and one tagged correctly as a 546 field. This is one reason it can be crucial to tag notes correctly. And, it may be why you sometimes see redundant information in differently tagged notes in WorldCat records.

And, this field may be added to PCC records when editing.

547 – Former Title Complexity Note

- Used mainly for integrating resources or latest entry continuing resources cataloging when the information is not apparent elsewhere in the description, such as the 247 field
- Example: **547 _ _ $a Title varies slightly, for some years it is preceded by report number (e.g. First annual report).**
- Example**: 547 _ _ $a Title history: Annual report of the Canadian Institute, 1886/87-1893/94; Archaeological report, 1894/95-1928.**
- Does not transfer when records are merged

This field is used for cataloging integrating resources or latest entry serials when a note cannot be generated from a 247 field. It explains complex variant title information.

550 – Issuing Body Note

- Mainly used with continuing resources, to explain the relationship between an issuing body and a publication
- Example: **550 _ _ $a Newsletter of the Rhode Island Bluegrass and Traditional Music Society.**
- Does not transfer when records are merged

Photo by Christian Englmeier on Unsplash

The issuing body note field is used when it may not be clear elsewhere in the description what the role of an issuing body is. It is used mainly with continuing resources, but could also be used with a multi-volume monograph, if perhaps the issuing body changed over time.
This example is from a newsletter titled *Hot off the press* and was used to justify a 710 field for the Rhode Island Bluegrass and Traditional Music Society, since that issuing body did not appear elsewhere in the description.

555 – Cumulative Index/Finding Aids Note

- Note identifying the availability of an index or finding aid whose only or major focus is the material described in the record
- Example: **555 0 _ $a Finding aid available in the repository (filed under Blue Earth County: District Court) and on the web: $u http://www.mnhs.org/library/findaids/SAM135.xml**
- Does not transfer when records are merged

Photo by Jon Tyson on Unsplash

This note is used mainly with local collections or archival materials, or with indexes for a specific set of volumes. It can have a subfield u with a URI that links to the finding aid or index, as the example on this slide does, which can be really handy for researchers.

580 – Linking Entry Complexity Note

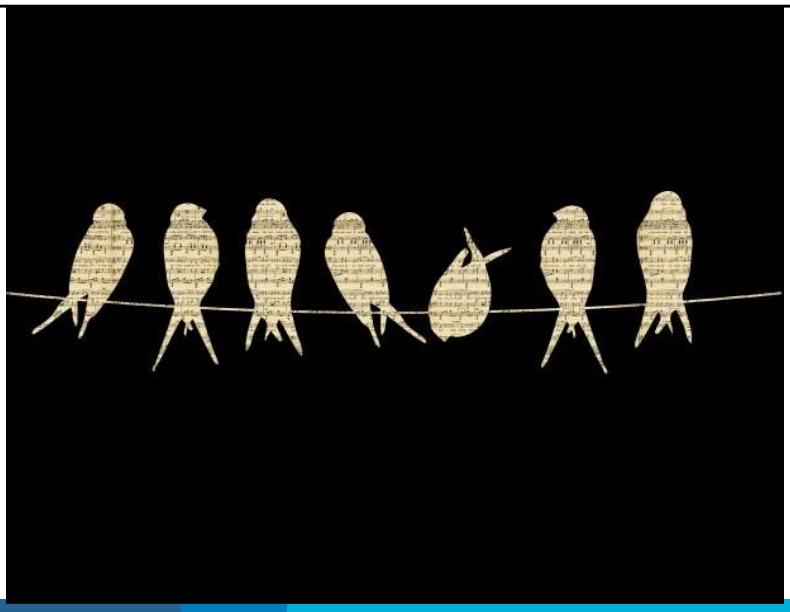
- Used to describe complex relationships between the materials described and other materials that cannot be described adequately in 76X-78X linking fields
- Example: **580 _ _ $a Blue book for 1941 is included in the Dec. 1940 issue of Marking industry (formerly Marking devices) and blue books for 1942-46, are included in the Jan. issue for 1942-46.**
- Does not transfer when records are merged

This field, which is the last one we are going to cover today, is mainly used with continuing resources. Complexity is the key word here. This field is only used when there are very complex relationships that cannot be described in the structured 7XX linking fields.

588 – Source of Description Note

- Information for catalogers on the source of the metadata
- Example: **588 0 _ $a Print version record.**
- Example: **588 1 _ $a Volume 5, number 10 (October 2014).**
- Does not transfer when records are merged

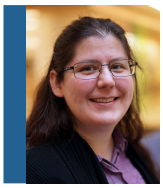
You see this note frequently on eBook records with the first example shown on this slide. This note is for catalogers and tells us that the description was derived from the record for the print version. The indicator 0 stands for “source of description”. This note is also used with cataloging of continuing resources, to identify which volume or issue was used as the basis for the description. The second example on the slide illustrates that use. The indicator value of 1 stands for latest issue consulted.



Graphic is in public domain.

And, that comes to the end of our required fields. We hope you've found our quick tour through the required notes fields useful. And now back over to Charlene.

On the call today



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Thank you!

Next Virtual AskQC Office Hours
January 2021

Time & topic: TBD

Session links available at oc.lc/askqc

Send cataloging policy questions at any time to askqc@oclc.org

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