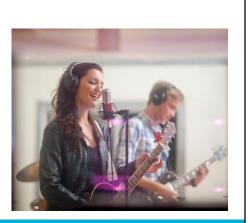


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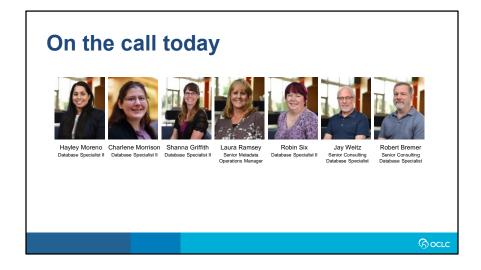
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- After the session you will be directed to a quick, optional survey

Please take moment to p purposes only and optio	wovide feedback on today's o nal. Thank you for attending t	flice hour session. The oday's session!	
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1. Did you find today	s session useful?		
Yes			
No			
Sort of			
2. Why did you choos	e the answer you did in qu	estion 1?	
Enter your answer			

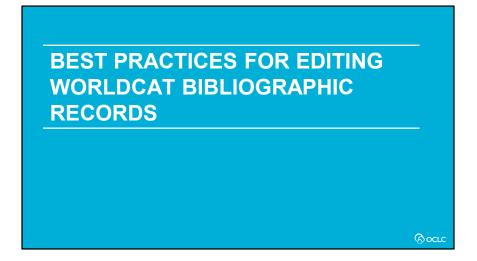


But first...

- Today's session will include questions for you
 - If on a computer, a pop-up box will appear
 - Choose an answer
- Results will be displayed once the poll closes
- Let's try it!

Polling						>
	ining: 04:45 may be record	ded.)				
1. Today is	?					
🔵 A. Tu	esday					
B. W	ednesday					
C. Th	ursday					
D. Fr	day (I'm in ti	ne East As	ia/Austra	ia region ar	nd it's morn	ing!

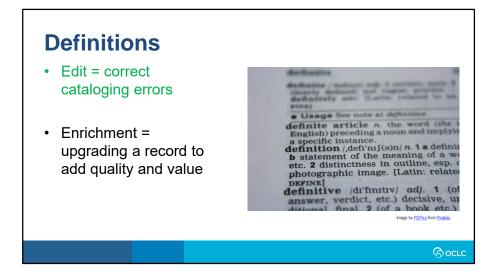
6



Thanks, Hayley!

As Hayley mentioned we are going to focus today's session on best practices for editing master records in WorldCat. We'll also look at some common errors, a few examples, and a couple interactive "Spot the errors" quizzes.

So let's get started...



Before going over any best practices though, I wanted to define what we will cover today as the line between "edits" and "enrichments" can get a bit blurry.

Editing for purposes of this presentation will focus on correcting cataloging errors to conform to cataloging guidelines.

While one could argue that editing a record is an act of enriching, enriching for purposes of this presentation, is focused on adding data that is not core or upgrading a record to a higher encoding level based on cataloging guidelines to improve discovery and usability. Join us for our February session to learn more about best practices for enriching records.

Edit (Merriam Webster)

"to alter, adapt, or refine especially to bring about conformity to a standard or to suit a particular purpose"

Error (Merriam Webster)

"an act involving an unintentional deviation from truth or accuracy"

Cataloging errors (LCAF authority record)

"errors in subject analysis; errors in punctuation, capitalization, MARC coding and typographical errors"

Enhancement (Merriam Webster)

"to increase or improve in value, quality, desirability, or attractiveness"



So let's talk about some best practices when editing.

First, in the vein of doing no harm remember that the "error" you see may not be an error at all. For example, the word color maybe spelled "color" or "colour" depending on whether American English or British English is used to describe the illustrative matter in the master record. This is not considered an error that must be corrected.

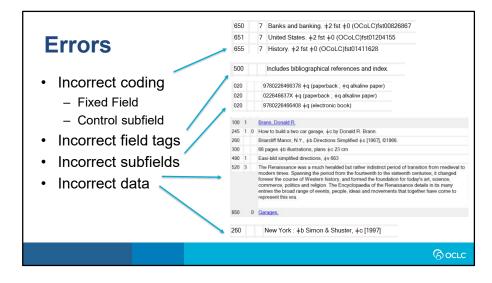
Second, different cataloging rules could result in a different presentation of the data in the records as well as requiring different information. For example, under AACR2, the copyright date would be included in field 260 subfield \$c with the copyright symbol next to the date. However, under RDA, the copyright date would be used in field 264, second indicator 4, subfield \$c.

Third, respect other cataloger's choices and do not assume errors. If you are unsure of whether or not something is an error, you are welcome to send these to <u>bibchange@oclc.org</u>. More information on this can be found in Bibliographic Formats and Standards Chapter 5.

Fourth, keep in mind the language of cataloging when determining whether there are errors or not.

Finally, what is the intent of the Inputting Library? For example, are they describing the transcript version of a thesis or are they describing the published version of the thesis.

BFAS oc.lc/bfas BFAS 5.2, Member Capabilities https://www.oclc.org/bibformats/en/quality.html#membercapabilities Common Errors https://help.oclc.org/Metadata_Services/WorldShare_Collection_Manager/Choose_your_Collection_Manager_workflow/ Data_sync_collections/Prepare_your_data/400ther_common_errors



Here are some common errors to look out for.

Incorrect coding could appear in the fixed fields and control subfields.

This can include editing the format. If your library input an audio book on monograph format instead of sound recording format, **and** you are the only holding library **and** you have a full level autho, you are welcome to make the edit yourself and change the record from books to sound recording format. Note, that when doing this it is helpful to get a fresh copy of the master record first.

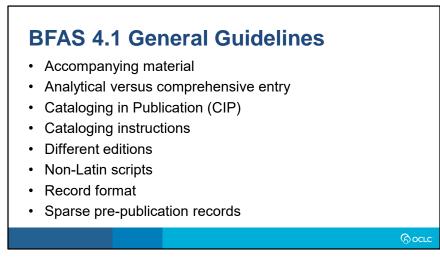
[NEXT] Another example of errors in coding would include the code in the subfield \$2 in the 6xx fields, might be incorrect. In this case, the code should be "fast" instead of "fst".

[NEXT] Incorrect field tags could also occur in the master record. For example, the bibliographic reference note should be in tag 504, not 500.

[NEXT] You might also find incorrect subfields as in this case where the electronic book ISBN appears in subfield \$a instead of subfield \$z in field 020.

The master record could also include incorrect data. I have two examples here. [NEXT] First, here's an example of an incorrect summary note. This book is clearly about building a garage but the summary note describes an encyclopedia of the Renaissance. This summary note should be deleted from the master record and, in these types of situations, feel free to also send a message to bibchange staff, to look into further. There may be other records affected.

[NEXT] Second, you might across typographical errors, such as this typo in the publisher's name. Again bear in mind the cataloging rules being used. A typo might be valid if it appears on the resource itself, depending on if a record is RDA or not.



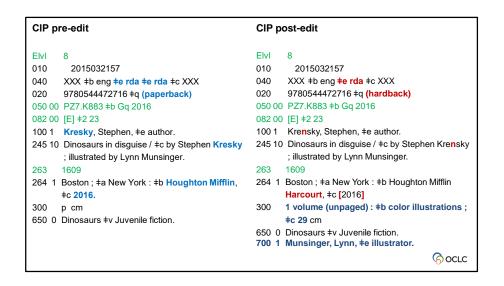
Before going into the example and interactive quiz, I did want to briefly point out some guidelines in BFAS 4.1 that cover some specific situations. While these guidelines you see listed on this slide focus on when you can input a new record, they can also inform on when it's okay to edit a record.

References:

BFAS 4.1, General Guidelines https://www.oclc.org/bibformats/en/input.html#generalguidelines BFAS 3, Special Cataloging Guidelines https://www.oclc.org/bibformats/en/specialcataloging.html BIBCO standard record https://www.loc.gov/aba/pcc/bibco/documents/PCC-RDA-BSR.pdf PCC Provider-Neutral E-Resource MARC Record Guide https://www.loc.gov/aba/pcc/scs/documents/PCC-PN-guidelines.html **CONSER Standard Record**

https://www.loc.gov/aba/pcc/conser/documents/CONSER-RDA-CSR.pdf RDA (RDA 0.6) / LC-PCC PS https://www.loc.gov/aba/rda/lcps_access.html AACR2 / LCRI

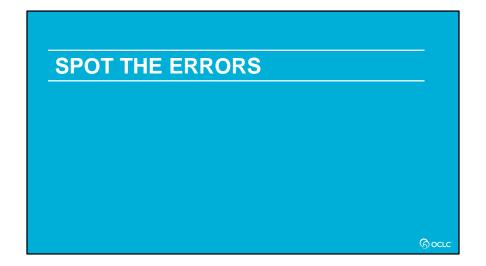
https://www.loc.gov/aba/publications/FreeLCRI/freelcri.html



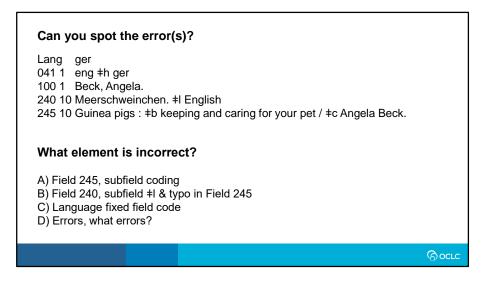
Here's an example of a CIP record. Before we get to the edits, we would like to remind everyone that while, you can edit CIP record, you should NOT edit field 263, national call number fields, field 040, and field 010. You also will be unable to edit the encoding level. These fields need to be retained in the master record. **The only exception to this would be editing the date in the call number field if you have the item in hand and the date is incorrect.**

[NEXT]

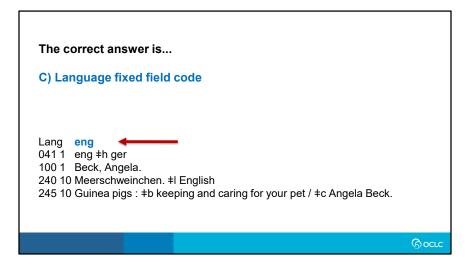
You can edit the record to correct these errors: Deleting the duplicate subfield \$e in field 040 ISBN is for hardback version Author name - typo Publisher name is not complete Publication date is presumed and should be in brackets There are a couple "enrichments" added as well but again, more information on best practices for enriching records will be covered in February.



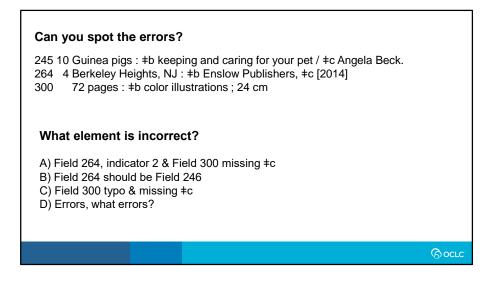
Now before I pass this over to Shanna, let's take a brief moment to test out what we covered so far.



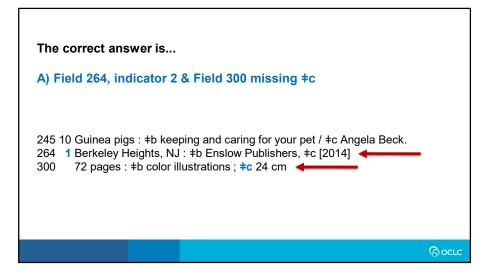
Can you spot the error in this portion of a record? Take a moment to look over this example and select an answer using the poll.



If you said C, you are correct. This book was originally written in German but this particular manifestation represents the English translation of the work so the language code should be "eng" instead of "ger".



Here's a bit more of the same record. What element is incorrect? Take a moment to look over it and select an answer using the poll.



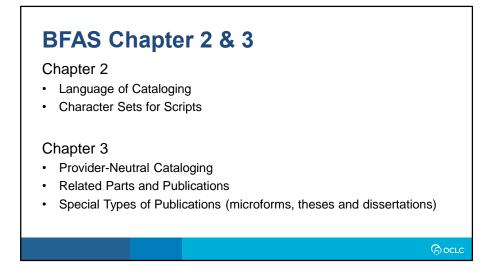
If you said A, you are correct!

The second indicator in field 264 should be 1, not 4 since this is the publication information and the 300 field should have \$c after the semicolon and before the height.

So now that we've gone over some general editing best practices, I'll hand it over to Shanna who will cover some editing best practices for special situations.



Thanks Charlene.



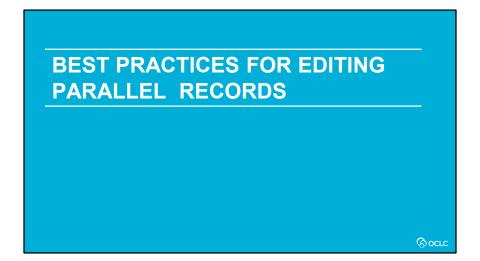
One of the things that Metadata Quality staff have been doing as part of the revision to Bibliographic Formats and Standards is to flesh out some of the special cataloging situations, providing more detailed guidelines and examples in those sections.

This work can be seen within these sections of chapters 2 and 3. I will be highlighting the best practices for editing parallel records and electronic resource records. [NEXT]

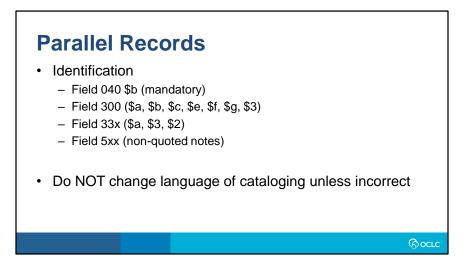
References:

BFAS 2, Online Cataloging: https://www.oclc.org/bibformats/en/onlinecataloging.html

BFAS 3, Special Cataloging Guidelines: https://www.oclc.org/bibformats/en/specialcataloging.html



So, now we'll take a look at the best practices for editing parallel records.



Parallel records are multiple records for the same manifestation of a work that are described in different languages.

These records can be identified by cataloger supplied elements, such as:

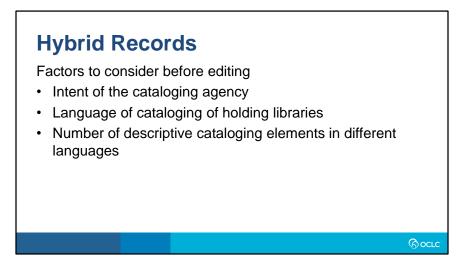
- field 040 \$b, which is mandatory and indicates the language of cataloging used to create the record
- terms and abbreviations in field 300
- terms and language code in 33x fields
- terms in non-quoted 5xx notes

When using an existing record, do NOT change the language of cataloging unless the language of cataloging coded in \$b does not accurately reflect the actual language of the cataloging record. [NEXT]

English	Polish
Lang eng 040 XXX *b eng * e rda * c XXX 100 1 Jensen, Paul. 245 10 National parks : *b a guide to the national parks and monuments of the United States / * c by Paul Jensen. 264 1 New York : *b Golden Press, *c 1964. 300 165 pages : *b illustrations (some color) color maps ; * c 29 cm 336 text +b txt * 2 rdacontent 337 unmediated *b n * 2 rdamedia 338 volume +b nc * 2 rdacarrier 500 Includes index .	Lang eng 040 XXX +b pol + e rda + c XXX 100 1 Jensen, Paul. 245 10 National parks : + b a guide to the national parks and monuments of the United States / + c by Paul Jensen. 264 1 New York : + b Golden Press, + c 1964. 300 165 stron : + b ilustracje kolorowe ; + c 29 cm 336 Tekst + b txt + 2 rdacontent/pol 337 Bez urządzenia pośredniczącego + b n + 2 rdamedia/pol 338 Wolumin + b nc + 2 rdacarrier/pol 504 Indeks.
	6 oclc

Here is an example of records, representing the same resource, appropriately cataloged in English and Polish languages of cataloging.

Note the 040 \$b code, in addition to the cataloger supplied elements in the respective languages of cataloging in fields 300, 33x, and the unquoted 5xx. [NEXT]



You may come across hybrid records in WorldCat. These are records with more than one language of descriptive cataloging.

There are three factors to take into account when considering a change in coding for the language of cataloging in these types of records.

- The intent of the cataloging agency
- The language of cataloging of the holding libraries
- The number of descriptive cataloging elements in different languages. As a general rule, a record's language of cataloging should reflect the predominant language used in the descriptive cataloging elements.

Based on these factors, if you determine that the language of the record matches the language used in your institution, then correct the errors and use the record for cataloging.

However, if you suspect that the record was incorrectly changed from one cataloging language into another, then

contact WorldCat Metadata Quality staff at <u>bibchange@oclc.org</u>. Staff will analyze the data, looking back through the history of the record, to decide whether to change the record back to its original language of cataloging.

More information regarding best practices can be found in Chapter 2.6 of Bibliographic Formats and Standards, and information for reporting errors can be found in Chapter 5.5. [NEXT]

References:

BFAS 2.6, Language of Cataloging: <u>https://www.oclc.org/bibformats/en/onlinecataloging.html#languageofcataloging</u>

BFAS 5.5, Requesting Changes to Records: https://www.oclc.org/bibformats/en/quality.html#requestingchangestorecords

Lang	eng	Lang	eng
040	XXX ‡b dan ‡e rda ‡c XXX	040 [°]	XXX +b eng +e rda +c XXX
100 1	Parent, Lucia E.	100 1	Parent, Lucia E.
245 10	Beagles : #b everything about purchase, care, nutrition, breeding, behavior and training / #c Lucia E. Parent ; illustrations by Michele Earle-Bridges.	245 10	Beagles : +b everything about purchase, care, nutrition, breeding, behavior and training / +c Lucia E. Parent ; illustrations by Michele Earle-Bridges.
264 1	Hauppauge, New York : +b Barron's, +c 1995.	264 1	Hauppauge, New York : +b Barron's, +c 1995.
300	88 pages : +b color illustrations ; +c 21 cm	300	88 pages : +b color illustrations ; +c 21 cm
336	tekst +b txt +2 rdacontent/dan	336	text +b txt +2 rdacontent
337	umedieret +b n +2 rdamedia/dan	337	unmediated +b n +2 rdamedia
338	bind +b nc +2 rdacarrier/dan	338	volume +b nc +2 rdacarrier
500	Filled with full-color photographs.	500	Filled with full-color photographs.
504	Med litteraturhenvisninger.	504	Includes bibliographic references.

In this example, the intent of the contributing library was to create a Danish language of cataloging record, but English libraries have attached their holdings.

Fields 300 and 500 are both English language of cataloging, while fields 040 subfield \$b, the 33x fields, and field 504 are in Danish. While the inputting library's intent was to enter a Danish language of cataloging record, most of the libraries who have holdings attached are English language libraries. [NEXT]

If the language of cataloging used at your institution is English, change the 040 subfield \$b from 'dan' to 'eng' and convert the 504 field and 33x fields to their English equivalent.

Because English libraries have attached their holdings, if the language of cataloging used at your institution is Danish or another non-English language, search for a record in your language of cataloging. If no record is found, create a new record, as appropriate, and report the hybrid record to WorldCat Metadata Quality staff for correction using the <u>bibchange@oclc.org</u> email address. [NEXT]

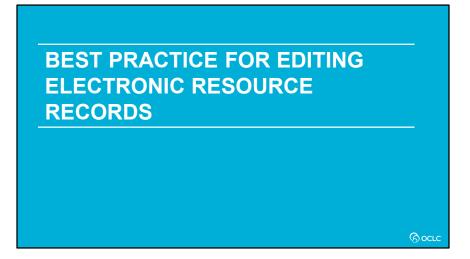
Lang 040	ita XXX ‡b fre ‡e ncafnor ‡c XXX	Lang 040	ita XXX ‡b fre ‡e ncafnor ‡c XXX
100 1	Da Porto, Luigi, ‡d 1485-1529. Romeo e Giulietta : ‡b variazioni sul mito /		Da Porto, Luigi, ‡d 1485-1529.) Romeo e Giulietta : ‡b variazioni sul mito /
	Porto, Shakespeare, Keller ; a cura di Anna		Porto, Shakespeare, Keller ; a cura di Anna
	Azzone Zweifel.		Azzone Zweifel
260	Venezia : +b Marsilio, +c ©2008.	260	Venezia : +b Marsilio, +c ©2008.
300	273 pages ; ‡c 19 cm	300	273 pages ; ‡c 19 cm
336	texte +b txt +2 rdacontent/fre	336	texte +b txt +2 rdacontent/fre
337	sans médiation +b n +2 rdamedia/fre	337	sans médiation +b n +2 rdamedia/fre
338	volume +b nc +2 rdacarrier/fre	338	volume +b nc +2 rdacarrier/fre
504 index.	Includes bibliographical references and	504 bibliog	Comprend des références graphiques et un index.

Here the intent of the contributing library was to create a French language of cataloging record. The contributing library is the only holding library.

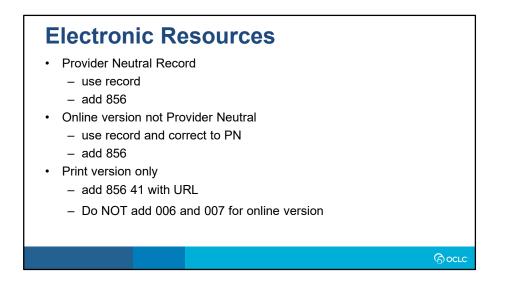
This record either became a hybrid record as the result of incorrect editing or was entered originally as a hybrid record. Field 040 subfield \$b is coded 'fre' along with the 33x fields, the extent could be either French or English, and the unquoted note is in English. [NEXT]

If the language of cataloging used at your institution is French, you may convert this record into a French language record by editing field 504 to the French equivalent.

If the language of cataloging used at your institution is not French, search for a record in your language of cataloging. If no record is found, create a new record, as appropriate, and report the hybrid record to WorldCat Metadata Quality staff for correction. [NEXT]



Now, I'll go over some best practices for editing electronic resource records.



Provider-neutral records omit provider-specific details and serve as "base" records in the shared WorldCat cataloging environment. The Provider-Neutral Guidelines are for online manifestations of a resource.

If a provider neutral record already exists for your resource, best practice is to use this record and add the appropriate 856 field. If the record is not provider neutral, please still use the record but edit the record to meet provider neutral guidelines and add the 856 field.

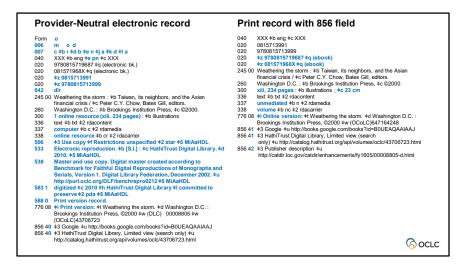
If the only record available represents the print version, you may edit the record to include the URL in field 856 with a second indicator value of 1 for version of resource. Do not add field 006 or 007 to the record for the print version because they are used only to describe the characteristics of the online resource.

More information on best practices for electronic resources can be found in Chapter 3 Special Cataloging Guidelines of Bibliographic Formats and Standards, and a link to the resources mentioned will be provided in the

slide notes. [NEXT]

References:

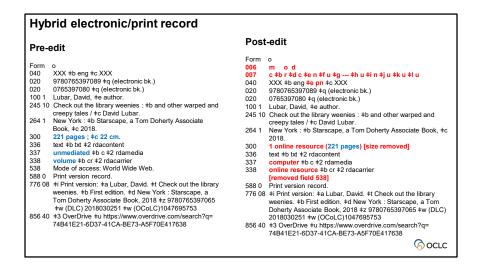
Provider-Neutral Guidelines: <u>http://www.loc.gov/aba/pcc/scs/documents/PCC-PN-guidelines.html</u>



Here is an example of the provider-neutral electronic version and the print version for the same manifestation with the differences between the two in blue.

You'll notice that each record has the ISBN for the other version in a 020 subfield \$z.

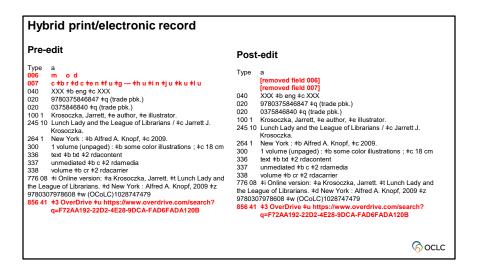
While the print version record includes 856 fields, there are no 006 and 007 fields, and the second indicators are correctly coded as a version of the resource or related resource. [NEXT]



This next example shows an electronic/print hybrid record. This often happens when the electronic version is derived from the print version record.

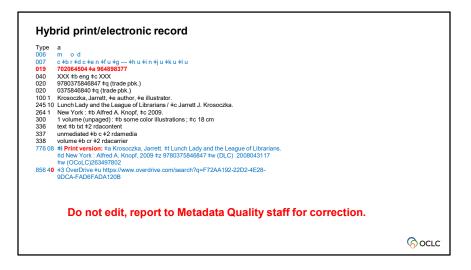
Looking at the entirety of the record, we can see that a majority of the record represents the electronic version, with the exception of the 300 field and the 33x fields. [NEXT]

So, this record could be edited to meet provider-neutral guidelines - adding the 006/007 fields, \$e 'pn' to the 040 field, correcting the 300 \$a to include '1 online resource' with the paging in parens, removing the size, and the 538 field. [NEXT]



Occasionally, you may also come across a print/electronic hybrid. This can happen when a library has added an 856 field with the correct second indicator value '1' for version of the resource, however they also included the 006 and 007 fields to represent the online version. [NEXT]

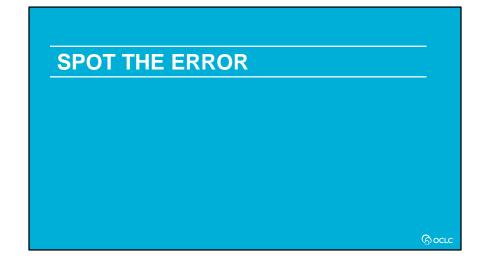
To edit the record, remove the 006 and 007 fields because they are used only to describe the characteristics of the online resource. The 856 field can remain in the record as it is correctly coded as another version of the resource. [NEXT]



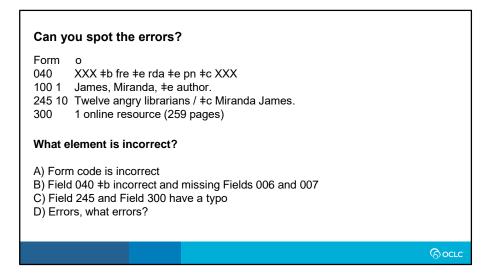
However, be suspect of records that represent the print version with electronic aspects and where there is a 776 field linking to the print record, the 856 second indicator value is '0' for the resource, and there is a 019 field to indicate records have been merged.

These types of records are usually the result of incorrectly coded electronic records that get merged into the print version record, which caused the 006, 007, 776, and 856 fields to transfer during the merge process, creating a hybrid record. [NEXT]

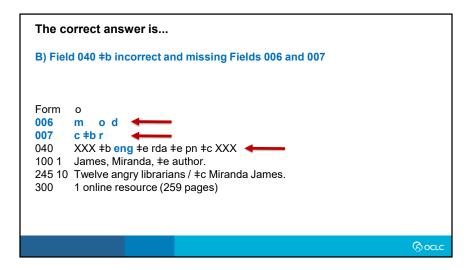
These records should not be edited, but instead reported to Metadata Quality staff so that any potential record recoveries can be done. [NEXT]



And now, time for some more fun! [NEXT]

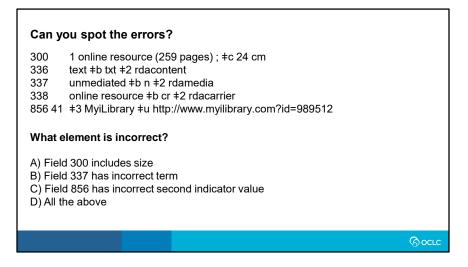


Can you spot the error in this portion of a record? Take a few seconds to look over this example and select an answer using the poll.

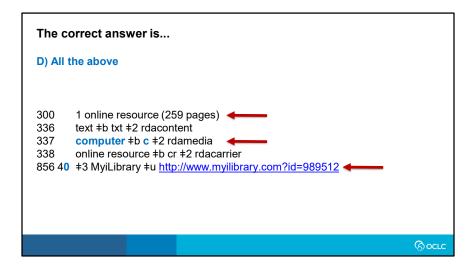


If you said B , you are correct!

This record represents the electronic version, so we would add the 006 and 007 fields. The language of cataloging is in English, so the language code in 040 subfield \$b should be 'eng' instead of 'fre'.

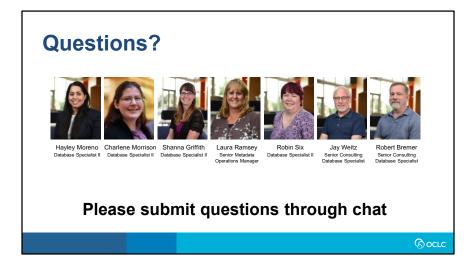


Here is a little more of the same record. Take a few seconds to look it over and select an answer using the poll.



If you said D, you are correct!

As the record represents the electronic version, the 300 field should not include the size. The term in field 337 subfield \$a should be corrected from 'unmediated' to 'computer' and the code in subfield \$b should be corrected from 'n' to 'c'. Also the 856 second indictor value should be corrected from '1' to '0' for the resource.



Thank you!

Send cataloging policy questions at anytime to: askqc@oclc.org

Session links available at: oc.lc/askqc

February Virtual AskQC Office Hours: Best practices for enhancing WorldCat bibliographic

records

Tuesday, February 11 at 9:00 AM Eastern Thursday, February 20 at 4:00 PM Eastern

Registration available at oc.lc/askqc

Because what is known must be shared.

COCLC