

Virtual AskQC Office Hours

With Great Power Comes Great Responsibility:
Editing Bibliographic Records

OCLC Metadata Quality
September 2022

Housekeeping

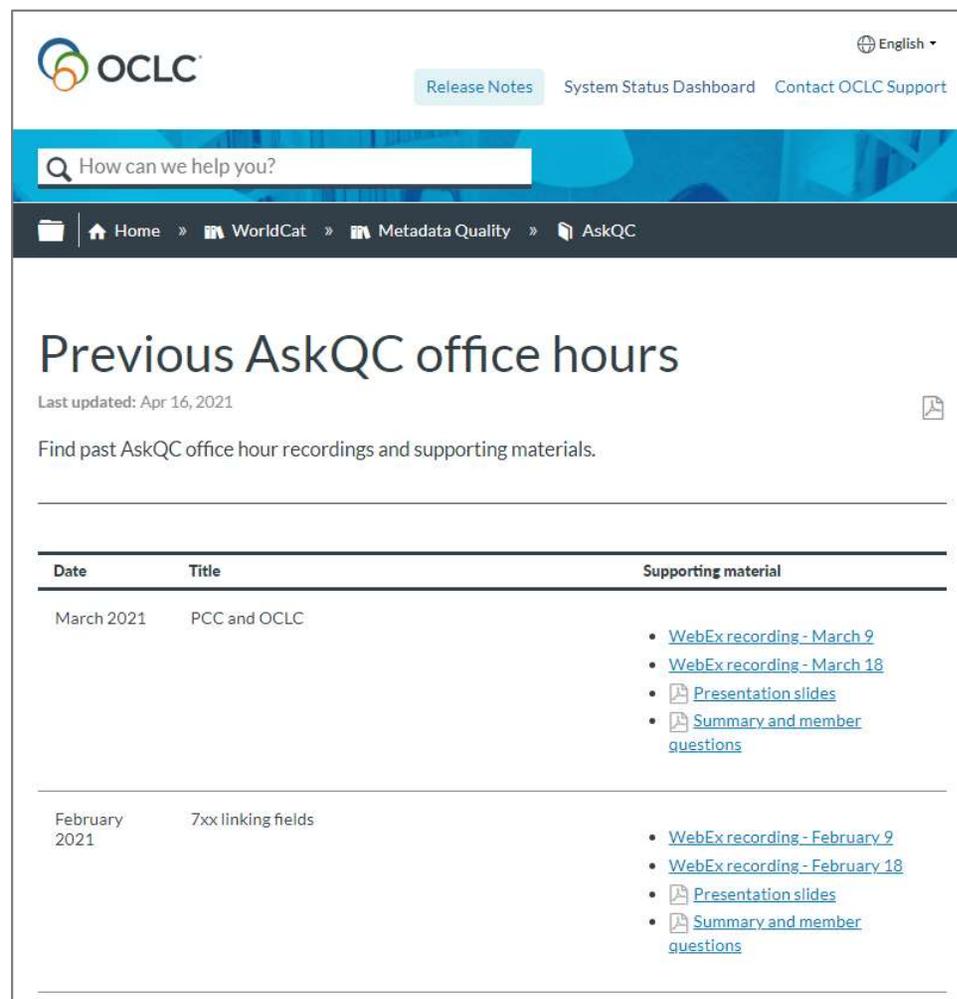
This session is being recorded



Housekeeping

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All session recordings, slides, and notes are available at oc.lc/askqc



The screenshot shows the OCLC website's AskQC page. At the top, there is the OCLC logo, a search bar with the text "How can we help you?", and navigation links for "Release Notes", "System Status Dashboard", and "Contact OCLC Support". Below the search bar is a breadcrumb trail: "Home » WorldCat » Metadata Quality » AskQC". The main heading is "Previous AskQC office hours", with a sub-heading "Last updated: Apr 16, 2021". Below this is a search prompt: "Find past AskQC office hour recordings and supporting materials." The content is organized into a table with three columns: "Date", "Title", and "Supporting material".

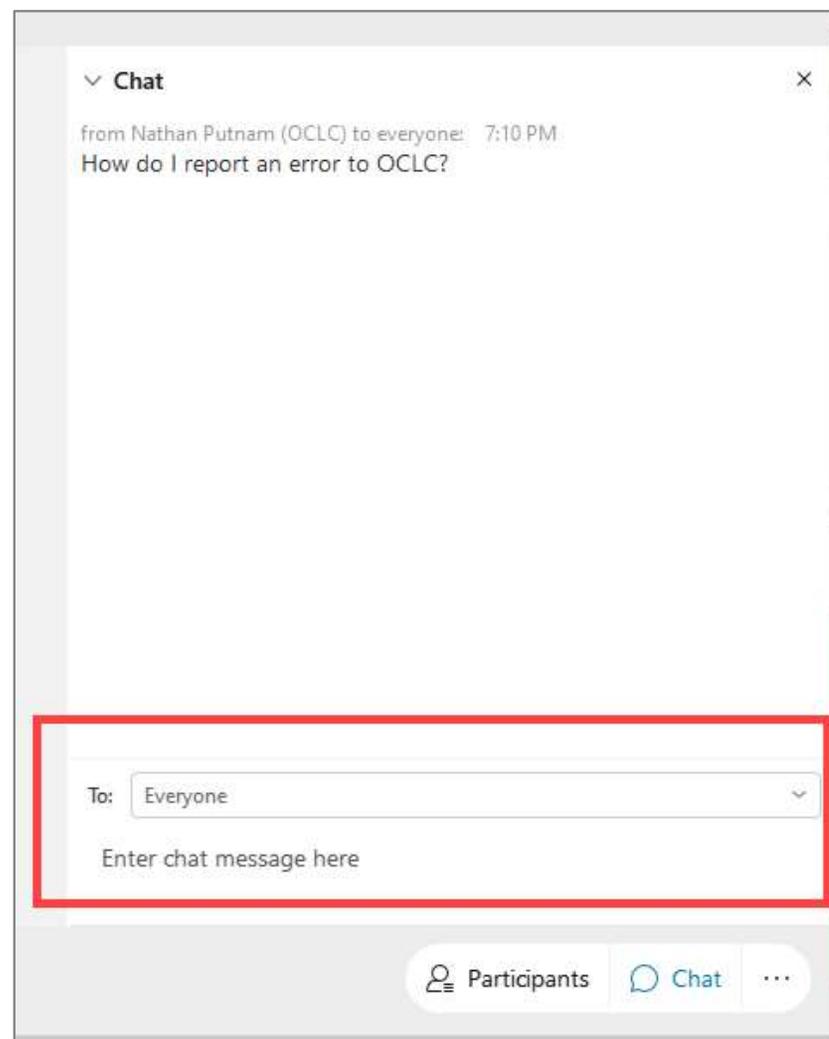
Date	Title	Supporting material
March 2021	PCC and OCLC	<ul style="list-style-type: none">WebEx recording - March 9WebEx recording - March 18Presentation slidesSummary and member questions
February 2021	7xx linking fields	<ul style="list-style-type: none">WebEx recording - February 9WebEx recording - February 18Presentation slidesSummary and member questions

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Enter questions in chat to “Everyone” at any time during the presentation



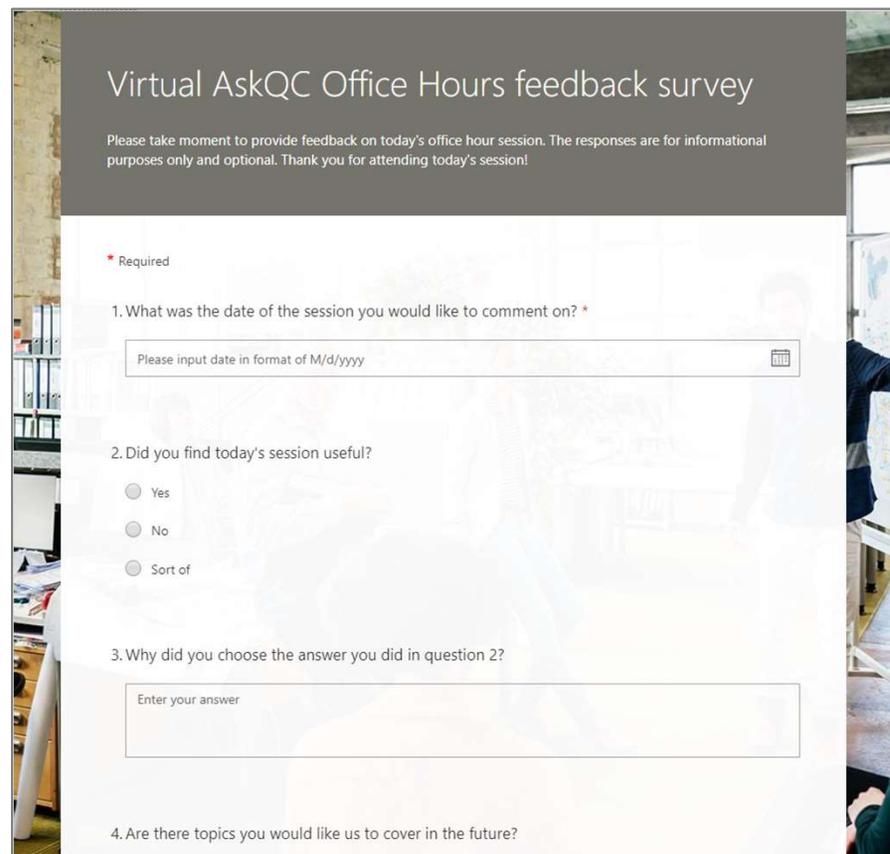
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Enter questions in chat to “Everyone” at any time during the presentation.

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



Virtual AskQC Office Hours feedback survey

Please take 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!

* Required

1. What was the date of the session you would like to comment on? *

Please input date in format of M/d/yyyy

2. Did you find today's session useful?

Yes

No

Sort of

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

Enter your answer

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

On the call today



Shanna Griffith

Data Analyst



Megan Johnson

Associate Data Analyst



Jay Weitz

Senior Consulting
Database Specialist



Robin Six

Data Analyst



Laura Ramsey

Senior Metadata
Operations Manager

With Great Power Comes Great Responsibility: Editing Bibliographic Records

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Fifty Years of OCLC Member Editing

- CONSER
- Enhance
- Minimal-Level Upgrade
- Database Enrichment
- National Level Enhance
- Expert Community



[Circular desk calendar owned by Mary Church Terrell. Collection of the Smithsonian National Museum of African American History and Culture, Gift of Ray and Jean Langston in memory of Mary Church and Robert Terrell. A2017.13.1.12.](#)

The Expert Community

Originally experimental, and permanent since 2009, OCLC's Expert Community provides the ability to make changes (additions, corrections, deletions of data) to almost all WorldCat bibliographic records.



You, the member library catalogers, are the experts!

Power and Responsibility

Who:

- Connexion users who have a Full or higher cataloging authorization level
- Record Manager users with the Cataloging Full role

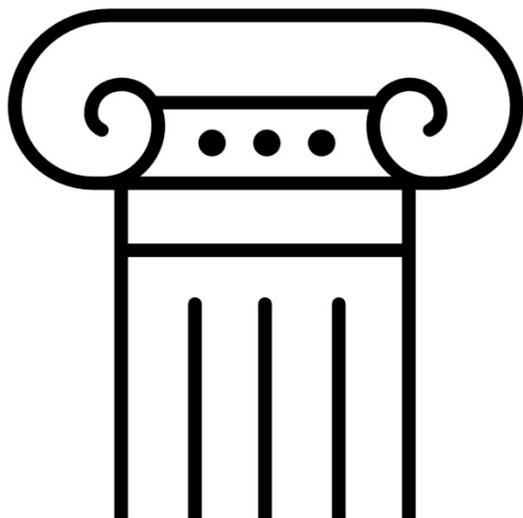
May:

- Edit and replace non-PCC and non-CONSER records
- Change encoding levels except “8” for CIP
- Edit any fields with a few minor exceptions

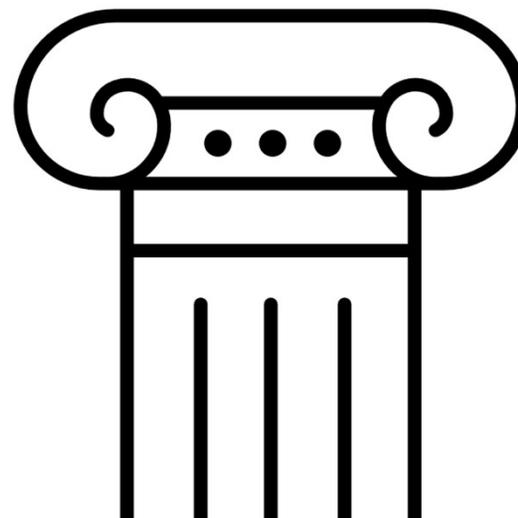


Principles for the Expert Community

Do No Harm



If In Doubt, Don't



Elements That Cannot Be Edited

- **Field 019**, OCLC Control Number Cross-Reference
- **Field 029**, Other System Control Number
- **Field 040**, Cataloging Source, subfields \$c, Transcribing Agency, and \$d, Modifying Agency
- **Field 066**, Character Sets Present
- **Field 850**, Holding Institution
- **Field 938**, Vendor-Specific Ordering Data

019 5985534 †a 1063393139
029 0 NLM †b 15730190R
029 1 UKMGB †b 011109083
040 NLM †b eng †c NLM †d NOH †d
IAX †d CUN †d UKMGB †d OCLCF †d
OCLCO †d EUW †d OCLCO †d OCLCQ
†d OCLCO †d NLM †d OCLCO †d
OCLCA †d P@N †d OCLCA †d OCLCO
†d OCL
066 †c Deva †c \$1 †c (N †c (3
850 DLC †a InU †a MiU †a WaU
938 Puvill Libros †b PUVL †n
8466309845 †c \$4.77

Cataloging Best Practices: Verify and Control

- Verify that the record meets its Encoding Level requirements
- Check coding and tagging of all fields, subfields, and indicators
- Verify all name/title access points in the appropriate authority file
- Verify classification numbers, as well as subject and genre/form access points, in schemes that your institution uses
- Control access points when possible



Photo by [Patrick Robert Doyle](#) on [Unsplash](#)

Cataloging Best Practices: Do Not (1)

- Do not alter a record to represent a different bibliographic entity
- Do not necessarily assume that your information must be correct and the existing record must be incorrect when cataloging differs
 - When in doubt, report apparent errors



Photo by [Héctor J. Rivas](#) on [Unsplash](#)

Cataloging Best Practices: Do Not (2)

- Do not change records from one language of cataloging to another
 - Language of Cataloging: field 040 subfield \$b
 - See BFAS 2.6 for details, including how to identify and deal with records that seem to mix languages of cataloging
 - Languages of subject access points are not a factor in determining language of cataloging
- Do not add descriptive elements in your language of cataloging to a record in a different language of cataloging



Photo by [Brett Jordan](#) on [Unsplash](#)

Cataloging Best Practices: Do Not (3)

- Do not replace a record solely to change elements that are a result of cataloger's judgment
- Do not delete data entered by another institution unless it is incorrect in substance
- Do not delete classification numbers or subject access points not used by your institution
- Do not add purely local information to a WorldCat record
 - See BFAS 3.4 for details



Photo by [Dan Gold](#) on [Unsplash](#)

Editing Non-PCC Records: *Type* and *BLvl*

- In all records, you can locally edit *Type* and *BLvl*
- You can change *Type* and *BLvl* in less than full records
- You can change *Type* and *BLvl* in full-level records you input where your holding symbol is set and there are no other holdings
- You cannot change *Type* and *BLvl* in full-level records or CONSER records unless the bibliographic format remains the same

Leader/06 - Type of Record

- a - Language material
- c - Notated music
- d - Manuscript notated music
- e - Cartographic material
- f - Manuscript cartographic material
- g - Projected medium
- i - Nonmusical sound recording
- j - Musical sound recording
- k - Two-dimensional nonprojectable graphic
- m - Computer file
- o - Kit
- p - Mixed materials
- r - Three-dimensional artifact or naturally occurring object
- t - Manuscript language material

Leader/07 - Bibliographic Level

- a - Monographic component part
- b - Serial component part
- c - Collection
- d - Subunit
- i - Integrating resource
- m - Monograph/Item
- s - Serial

Editing Non-PCC Records: *ELvI*

- You can upgrade any less than full Encoding Level record to a higher *ELvI*
 - Currently prefer the use of MARC Encoding Levels over the OCLC-defined *ELvIs*
- Exceptions for editing Encoding Level:
 - BIBCO records, which are coded “pcc” in [field 042](#)
 - CONSER continuing resources records, which are coded *pcc*, *msc*, or one of the other CONSER codes in [field 042](#)
 - Encoding Level “8” prepublication records
 - You can add or edit almost any field, but the Encoding Level “8” itself cannot be changed

Encoding Level	Definition	Action	Edit Encoding Level to
I	Full level input by OCLC participants	Edit as needed	blank
J	Deleted record	Upgrade to minimal level or full level	7 or blank
K	Minimal level input by OCLC participants	Upgrade to full level	blank
M	Added from a batch process	Upgrade to full level	blank
blank	Full level	Edit as needed	blank
1	Full level, material not examined	Upgrade to full level	blank
2	Less-than-full level, material not examined	Upgrade to minimal level or full level	7 or blank
3	Abbreviated level	Upgrade to minimal level or full level	7 or blank
4	Core level	Upgrade to full level	blank
5	Partial (preliminary) level	Upgrade to minimal level or full level	7 or blank
7	Minimal level	Upgrade to full level	blank

Editing Non-PCC Records: Local Data

- You can add local information as part of the editing that you do before replacing the record
 - BFAS 5.2.2 includes a chart under “Replacing Records with Local Information” that lists all of the local fields to which this applies
- The local information is not added to the WorldCat record as part of the replace transaction, but it is retained in your working copy of the record
- If you complete editing before replacing the record, you can add your holdings immediately after completing the replace transaction

Tag	Name
049	Local Holdings
059	Local Processing Information
090	Locally Assigned LC-type Call Number Special condition: For all except continuing resources, 090 is retained if record contains no 050 . For continuing resources, 090 is retained if record contains no 050, or if 050 contains a word or phrase instead of a call number.
092	Locally Assigned Dewey Call Number Special condition: 092 is retained if record contains no 082 .
096	Locally Assigned NLM-type Call Number Special condition: 096 is retained if record contains no 060 .
098	Other Classification Schemes
099	Local Free-Text Call Number
590	Local Note
599	Differentiable Local Note
690	Local Subject Added Entry--Topical Term
691	Local Subject Added Entry--Geographic Name
695	Added Class Number

Editing Non-PCC Records: Continuing Resources

Only those WorldCat users with CONSER level authorizations or account roles can alter CONSER-authenticated continuing resource records, which are identified by any of these field 042 codes:

- **isds/c** ISSN Canada
- **lc** Library of Congress
- **lcac** Library of Congress Children's and Young Adults' Cataloging Program
- **lccopycat** LC Copy Cataloging
- **lcd** CONSER Full Authority Application
- **msc** CONSER Minimal Authority Application
- **nlc** Library and Archives Canada CONSER and Authority
- **nsdp** United States ISSN Center
- **nst** New Serial Titles
- **pcc** Program for Cooperative Cataloging
- **premarc** LC PreMARC Retrospective Conversion Project

With a full-level authorization or role, you can close-out, link, edit, and/or correct any non-CONSER continuing resource record

022 2785-3861
082 04 722.70937 ‡2 23
222 4 The Journal of ancient architecture
245 04 The journal of ancient architecture.
264 1 Pisa ; ‡a Roma : ‡b Fabrizio Serra Editore, ‡c 2022-
300 ‡b illustrations (black and white) ; ‡c 32 cm
310 Annual
336 text ‡2 rdacontent
337 unmediated ‡2 rdamedia
338 volume ‡2 rdacarrier
362 0 1 (2022)-

Editing PCC Records (1)

BIBCO Records in WorldCat

- Non-PCC participants with full authorizations may edit and/or add any of more than 90 MARC fields
- Fields and circumstances listed in BFAS 5.2.3 under “Enriching BIBCO Records”



[William Henry Holmes, Maryland Wheat Fields, n.d., watercolor and pencil on paperboard, Smithsonian American Art Museum, Gift of Dr. William Henry Holmes, 1930.12.10](#)

Editing PCC Records (2)

- BIBCO record requires every access point to be backed up with authority record
 - Fields 1XX and 700-730 can be neither added nor edited
- May be edited and/or added:
 - Most classification and subject fields in schemes not already present
 - Many 33X, 34X, 38X fields
 - Many 5XX fields
 - Many 76X-77X linking fields
 - Series fields 490 and 800-830
 - Field 856

Tag	Add field if not present	Add another field if already present	Edit if present
006	✓	✓	✓
007	✓	✓	✓
008			✓
020	✓	✓	✓
024	✓	✓ if the field has a different value in subfield ≠2	
027	✓	✓	✓
028	✓	✓	✓
031	✓	✓	✓
033	✓	✓	✓
034	✓	✓	✓
037	✓		
041	✓	✓	✓
042	✓ if authorized		✓ if authorized

Avoiding the Dreaded “Not Authorized” Response

- Add any new fields you are authorized to add
- Edit any existing fields you are authorized to edit
- Try to make all your changes as part of a single replace transaction
- Do any local edits as a next step and update the record to add your holdings
- If all else fails, report the record to bibchange@oclc.org



Photo by [Jasmin Sessler](#) on [Unsplash](#)

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Thank you!

October Virtual AskQC Office Hours

411 on FAST: The what, why, and how of Faceted Application of Subject Terminology (FAST)

Tuesday, 11 Oct. at 10:00 AM Eastern
Thursday, 20 Oct. at 4:00 PM Eastern

Registration and session links
available at oc.lc/askqc

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



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