

Virtual AskQC Office Hours

Bibliographic Formats and Standards (BFAS), the early chapters

OCLC Metadata Quality

February 2023



Housekeeping

This session is being recorded



Housekeeping

This session is being recorded
All session recordings, slides, and notes are available at oclc.org/askqc

The screenshot shows the OCLC website interface. At the top, there is a navigation bar with the OCLC logo, a search bar, and links for 'Release Notes', 'System Status Dashboard', and 'Contact OCLC Support'. Below the navigation bar is a breadcrumb trail: 'Home > WorkCafe > Metadata Quality > AskQC'. The main content area is titled 'Previous AskQC office hours' and includes a sub-header 'List updated: Apr 26, 2023'. Below this is a search prompt: 'Find past AskQC office hour recordings and supporting materials:'. A table follows, listing office hours by date and title, with links to supporting materials.

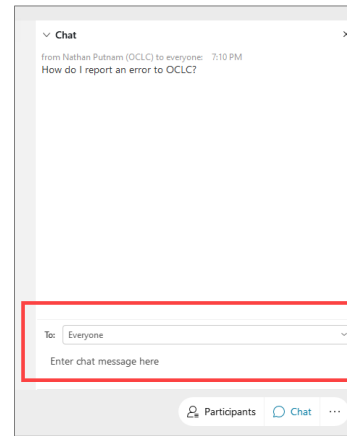
Date	Title	Supporting material
March 2021	PCC and OCLC	<ul style="list-style-type: none">• WebEx recording - March 9• WebEx recording - March 18• Presentation slides• Summary and member questions
February 2021	7x1 linking needs	<ul style="list-style-type: none">• WebEx recording - February 9• WebEx recording - February 18• Presentation slides• Summary and member questions

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



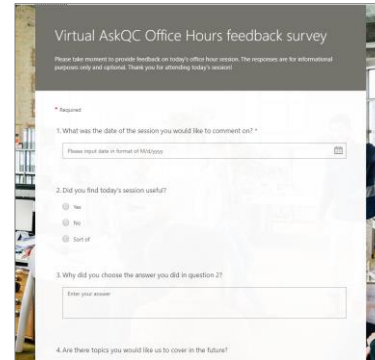
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Enter questions in chat to “Everyone” at any time during the presentation.

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



Virtual AskQC Office Hours feedback survey

Please take 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!

* Required

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

Please input date in format of MM/DD/YYYY

2. Did you find today's session useful? *

No

Yes

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
Senior Data Analyst



Robin Six
Senior Data Analyst



Charlene Morrison
Senior Data Analyst



Jay Weitz
Senior Consulting
Database Specialist



Laura Ramsey
Senior Metadata
Operations Manager

Bibliographic Formats and Standards (BFAS), the early chapters

Robin Six
Senior Data Analyst

Charlene Morrison
Senior Data Analyst

7 February 2023

Virtual AskQC Office Hours: Bibliographic Formats and Standards (BFAS), the early chapters



<https://www.oclc.org/bibformats/en.html>

[oc.lc/bfas](https://www.oclc.org/bibformats/en.html)

Chapter 1

Introduction

- 1.1 MARC Bibliographic Records
- 1.2 Input Standards
- 1.3 Bibliographic Formats
- 1.4 WorldCat Bibliographic Records
- 1.5 Cataloging Documentation

Last revised 2022



Photo by Akhil Yerabati on Unsplash

<https://www.oclc.org/bibformats/en/introduction.html>

Chapter 1

Introduction

- 1.1 MARC Bibliographic Records
- 1.2 Input Standards
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Photo by Derek Goldberg on Unsplash

<https://www.oclc.org/bibformats/en/introduction.html#section1.1>

Chapter 1

Introduction

- 1.1 MARC Bibliographic Records
- **1.2 Input Standards**
- 1.3 Bibliographic Formats
- 1.4 WorldCat Bibliographic Records
- 1.5 Cataloging Documentation



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<https://www.oclc.org/bibformats/en/introduction.html#section1.2>

Chapter 1

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- 1.1 MARC Bibliographic Records
- 1.2 Input Standards
- 1.3 Bibliographic Formats
- 1.4 WorldCat Bibliographic Records
- 1.5 Cataloging Documentation



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<https://www.oclc.org/bibformats/en/introduction.html#section1.3>

Chapter 1

Introduction

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- 1.2 Input Standards
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- 1.5 Cataloging Documentation



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<https://www.oclc.org/bibformats/en/introduction.html#section1.4>

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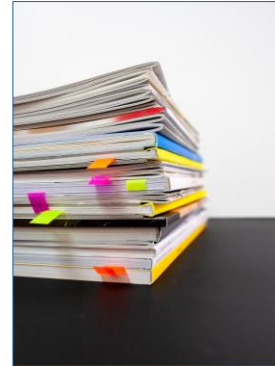


Photo by Bernd Klutsch on Unsplash

<https://www.oclc.org/bibformats/en/introduction.html#section1.5>

Chapter 2

Online Cataloging

- 2.1 Types and Levels of Cataloging
- 2.2 Creating Bibliographic Records
- 2.3 Transcribing Cataloging Copy
- 2.4 Full, Minimal, and Abbreviated-Level Cataloging
- 2.5 PCC Standard Records

Last revised 2019, 2022



Photo by Aaron Burden on Unsplash

<https://www.oclc.org/bibformats/en/onlinecataloging.html>

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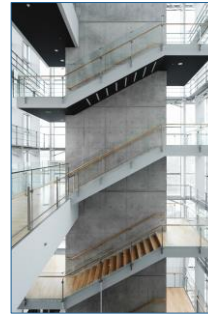


Photo by [Jonas Jacobsson](#) on [Unsplash](#)

<https://www.oclc.org/bibformats/en/onlinecataloging.html#types>

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Photo by Erik Mclean on Unsplash

<https://www.oclc.org/bibformats/en/onlinecataloging.html#create>

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<https://www.oclc.org/bibformats/en/onlinecataloging.html#transcribe>

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<https://www.oclc.org/bibformats/en/onlinecataloging.html#levels>

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Photo by Ronan Furuta on Unsplash

<https://www.oclc.org/bibformats/en/onlinecataloging.html#pccstandardrecords>

Chapter 2

Online Cataloging

- 2.6 Language of Cataloging
- 2.7 Character Set
- 2.8 Punctuation
- 2.9 Controlling and Enrichment
- 2.10 Cataloging Practices



Photo by Mick Haupt on Unsplash

<https://www.oclc.org/bibformats/en/onlinecataloging.html#languageofcataloging>

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<https://www.oclc.org/bibformats/en/onlinecataloging.html#characters>

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Photo by Setyaki Irham on [Linsplash](#)

<https://www.oclc.org/bibformats/en/onlinecataloging.html#punctuation>

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<https://www.oclc.org/bibformats/en/onlinecataloging.html#controlling>

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Photo by [Josh Hill](#) on [Unsplash](#)

<https://www.oclc.org/bibformats/en/onlinecataloging.html#catalogingpractices>

Chapter 3

3.1 Provider-Neutral Cataloging

3.2 Related Parts and Publications

3.3 Special Types of Publications

3.4 Local Information in Records



Photo by Elena G on Unsplash

Last revised 2022

<https://www.oclc.org/bibformats/en/specialcataloging.html>

Chapter 3, parts 3.1-3.2

3.1 Provider-Neutral Cataloging

- 3.1.1 Online Resources
- 3.1.2 Photocopies and Print-on-Demand Reproductions

3.2 Related Parts and Publications

- 3.2.1 "In" Analytics
- 3.2.2 Offprints and Detached Copies
- 3.2.3 Supplementary and Accompanying Material
- 3.2.4 Parts of a Multipart Monograph or Serial



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Image by [Openicons](#) from [Pixabay](#)

<https://www.oclc.org/bibformats/en/specialcataloging.html#providerneutralcataloging>

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<https://www.oclc.org/bibformats/en/specialcataloging.html#inanalytics>

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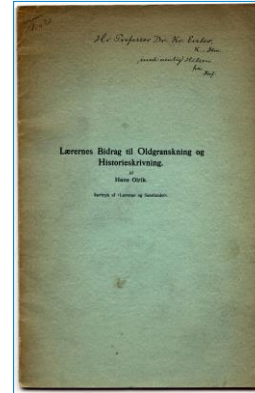


Image by [Heelrasper](#) from [Wikimedia Commons](#)

<https://www.oclc.org/bibformats/en/specialcataloging.html#offprintsanddetachedcopies>

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Photo by Kelly Sikkema on Unsplash

<https://www.oclc.org/bibformats/en/specialcataloging.html#supplementarymaterial>

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Image by jacqueline macou from Pixabay

<https://www.oclc.org/bibformats/en/specialcataloging.html#partsofmultipartmonographorserial>

Chapter 3, parts 3.3-3.4

3.3 Special Types of Publications

• 3.3.1 Electronic Resources

- 3.3.2 Integrating Resources
- 3.3.3 Local Recordings
- 3.3.4 Microforms
- 3.3.5 Technical Reports
- 3.3.6 Theses and Dissertations

3.4 Local Information in Records

- 3.4.1 Copy- or Institution-Specific Information



Image by [Welcome to All!](#) from [Pixabay](#)

<https://www.oclc.org/bibformats/en/specialcataloging.html#electronicresources>

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<https://www.oclc.org/bibformats/en/specialcataloging.html#integratingresources>

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<https://www.oclc.org/bibformats/en/specialcataloging.html#localrecordings>

Chapter 3, parts 3.3-3.4

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<https://www.oclc.org/bibformats/en/specialcataloging.html#microforms>

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<https://www.oclc.org/bibformats/en/specialcataloging.html#technicalreports>

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Microsoft Stock Image

<https://www.oclc.org/bibformats/en/specialcataloging.html#thesesanddissertations>

Chapter 3, parts 3.3-3.4

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Microsoft Stock Image

<https://www.oclc.org/bibformats/en/specialcataloging.html#copyorinstitutionspecificinformation>

Chapter 4

4.1 General Guidelines

4.2 Field-by-Field Guidelines for New Records

Last revised 2021



Photo by Gabriel Gusmao on Unsplash

<https://www.oclc.org/bibformats/en/input.html>

Chapter 4

4.1 General Guidelines

4.2 Field-by-Field Guidelines for New Records

- Fixed Field
- 0xx Control Numbers and Code Fields
- 1xx Main Entry Fields
- 2xx Title, Edition, Imprint, etc., Fields
- 3xx Physical Description Fields
- 4xx Series Statement Field
- 5xx Note Fields
- 6xx Subject Access Fields
- 7xx Added and Linking Entry Fields
- 8xx Series Added Entry, Holdings, Location, etc., Fields
- 9xx Local Use Fields



Image by [Fabrice](#) from [Pixabay](#)

<https://www.oclc.org/bibformats/en/input.html#generalguidelines>

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Photo by [Jon Tyson](#) on [Unsplash](#)

<https://www.oclc.org/bibformats/en/input.html#fieldbyfield>

BFAS Chapter 5

5.1 OCLC Member Quality Assurance

5.2 Member Capabilities

5.3 National Cooperative Programs

5.4 WorldCat Metadata Quality Activities

5.5 Requesting Changes to Records



Image by Hebi B. from Pixabay

Last revised 2021

<https://www.oclc.org/bibformats/en/quality.html>

BFAS Chapter 5

5.1 OCLC Member Quality Assurance

5.2 Member Capabilities

- 5.2.1 General Guidelines
- 5.2.2 Editing capabilities for non-PCC records
- 5.2.3 Editing capabilities for PCC records

5.3 National Cooperative Programs

5.4 WorldCat Metadata Quality Activities

5.5 Requesting Changes to Records



Image by Gerd Altmann from Pixabay

<https://www.oclc.org/bibformats/en/quality.html#oclcmemberqualityassurance>

BFAS Chapter 5

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Image by Gerd Altmann from Pixabay

<https://www.oclc.org/bibformats/en/quality.html#membercapabilities>

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Image by Gerd Altmann from Pixabay

<https://www.oclc.org/bibformats/en/quality.html#cooperativeprograms>

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Authority Change Requests

Bibliographic Change Requests

Automation

Merging Duplicates

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<https://www.oclc.org/bibformats/en/quality.html#worldcatmetadataqualityactivities>

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<https://www.oclc.org/bibformats/en/quality.html#requestingchangestorecords>

Previous VAOH 2018

- Cataloging defensively with edition statements**
 - February 2018
 - Chapter 4
 - The edition statement is a field that is heavily used in OCLC's matching and merging algorithms and through all formats. Chapter 4 has long served to provide a common basis for decision making in the creation of WorldCat bibliographic records by the participants in the OCLC Cooperative.
- Processing change requests**
 - March 2018
 - Chapter 5
 - This session focuses on how WorldCat Metadata Quality staff sort, analyze, handle error reports, and how they are categorized to give members a better understanding of the volume of requests processed and the care we take in processing each request.

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February 2018::Cataloging defensively with edition statements

https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/100_2018_AskQC_office_h_ours#February_2018::_Cataloging_defensively_with_edition_statements

March 2018::Processing change requests

https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/100_2018_AskQC_office_h_ours#March_2018::_Processing_change_requests

Previous VAOH 2019

- When to input a new record**
 - January 2019
 - Chapter 4
 - OCLC's When to Input a New Record, chapter 4 of Bibliographic Formats and Standards (BFAS) has long served to provide a common basis for decision making in the creation of the WorldCat bibliographic database by participants in the OCLC cooperative. When to Input has also been the public reflection of how OCLC's matching algorithms, including Duplicate Detection and Resolution (DDR), and automated loading of records are intended to work.
- Provider-Neutral cataloging**
 - February 2019
 - Chapter 3
 - Provider-Neutral Cataloging overview along with a history of how Provider-Neutral cataloging has evolved and explanation of the single bibliographic record concept to describe all instances of the same manifestation of a resource, what information to include, and what information not to include.

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January 2019::When to input a new record

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/095_2019_AskQC_office_h
ours#January_2019::_When_to_input_a_new_record](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/095_2019_AskQC_office_hours#January_2019::_When_to_input_a_new_record)

February 2019::Provider neutral cataloging

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/095_2019_AskQC_office_h
ours#February_2019::_Provider_neutral_cataloging](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/095_2019_AskQC_office_h
ours#February_2019::_Provider_neutral_cataloging)

Previous VAOH 2020

- Best practices for editing WorldCat bibliographic records
 - January 2020
 - Chapters 4 & 5
 - The focus of this presentation was correcting cataloging errors to conform to cataloging guidelines.
- Best practices for enriching WorldCat bibliographic records
 - February 2020
 - Chapters 4 & 5
 - The focus of this presentation was to detail the difference between Editing, Enriching and Enhancing bibliographic records in WorldCat and explain enriching, or adding fields that are not already present, to existing WorldCat records. This includes which fields you can and cannot add depending on your role or authorization level.

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January 2020::Best practices for editing WorldCat bibliographic records

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/090_2020_AskQC_office_h
ours#January_2020::_Best_practices_for_editing_WorldCat_bibliographic_records](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/090_2020_AskQC_office_hours#January_2020::_Best_practices_for_editing_WorldCat_bibliographic_records)

February 2020::Best practices for enriching WorldCat bibliographic records

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/090_2020_AskQC_office_h
ours#February_2020::_Best_practices_for_enriching_WorldCat_bibliographic_records](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/090_2020_AskQC_office_h
ours#February_2020::_Best_practices_for_enriching_WorldCat_bibliographic_records)

Previous VAOH 2021

Local data in WorldCat records

- April 2021
- Chapter 3
- How members can keep their local data out of the shared bibliographic record, by either using other types of locally maintained records or in fields not retained in the WorldCat record.

Medley of popular topics

- August 2021
- All Chapters
- Popular topics gleaned from previous AskQC VAOH included brief takes on authorities, controlling headings, non-Latin script in WorldCat records, Duplicate Detection and Resolution (DDR), and Faceted Application of Subject Terminology (FAST). All the topics presented are from frequently asked questions received in the past.

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April 2021:: Local data in WorldCat records

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/085_2021_AskQC_office_h
ours#April_2021::_Local_data_in_WorldCat_records](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/085_2021_AskQC_office_hours#April_2021::_Local_data_in_WorldCat_records)

August 2021:: Medley of popular topics

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/085_2021_AskQC_office_h
ours#August_2021::_Medley_of_popular_topics](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/085_2021_AskQC_office_h
ours#August_2021::_Medley_of_popular_topics)

Previous VAOH 2022

Bibliographic Formats & Standards chapter 3: A deep dive

- March 2022
- Chapter 3
- A closer look at the cataloging practices and special materials that present unique problems to catalogers.

Editions annotated, collected, corrected, and expanded: The varieties and roles of Edition Statements

- April 2022
- Chapter 4
- Examines the many varieties of edition statements (and things that look like edition statements), the roles they play in automated record matching, and how they can help you distinguish similar but distinct resources.

With Great Power Comes Great Responsibility: Editing Bibliographic Records

- September 2022
- Chapter 4 & 5
- The OCLC Expert Community gives you great power to edit most existing WorldCat bibliographic records, even many records that are coded "pcc" in field 042. But with great power comes great responsibility. This VAOH session reviewed how you can use your editing power both confidently and responsibly.

51 February 2023
Virtual AskQC Office Hours: Bibliographic Formats and Standards (BFAS), the early chapters

March 2022:: Bibliographic Formats & Standards chapter 3: A deep dive

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_h
ours#March_2022::_Bibliographic_Formats_.26_Standards_chapter_3:_A_deep_dive](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_hours#March_2022::_Bibliographic_Formats_.26_Standards_chapter_3:_A_deep_dive)

April 2022:: Editions annotated, collected, corrected, and expanded: The varieties and roles of Edition Statements

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_h
ours#April_2022::_Editions_annotated.2C_collected.2C_corrected.2C_and_expanded:_The_varieties_and_roles_of
_Edition_Statements](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_hours#April_2022::_Editions_annotated.2C_collected.2C_corrected.2C_and_expanded:_The_varieties_and_roles_of_Edition_Statements)

September 2022::With Great Power Comes Great Responsibility: Editing Bibliographic Records

[https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_h
ours#September_2022::_With_Great_Power_Comes_Great_Responsibility:_Editing_Bibliographic_Records](https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours/080_2022_AskQC_office_hours#September_2022::_With_Great_Power_Comes_Great_Responsibility:_Editing_Bibliographic_Records)

On the call today



Shanna Griffith
Senior Data Analyst



Robin Six
Senior Data Analyst



Charlene Morrison
Senior Data Analyst



Jay Weitz
Senior Consulting
Database Specialist



Laura Ramsey
Senior Metadata
Operations Manager

Thank you!

The Next Virtual AskQC Office Hours
Languages, Non-Latin Scripts and Mysterious
MARC 880 fields

Tuesday, 14 March at 10:00 AM Eastern
Thursday, 23 March at 4:00 PM Eastern

Registration and session links
available at oclc.org/askqc

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

