2018-01-31 Virtual AskQC Office Hours

Topic presentation

260 to 264 Conversion, presented by Cynthia Whitacre

Cynthia Whitacre (Metadata Policy Manager) presented on the OCLC 260 to 264 MARC conversion project. When the RDA cataloging standard first came out in 2010 the 264 field had not yet been implemented. The MARC 260 field was still being used for publication information. The MARC field 264 was approved until 2011 and it was implemented in WorldCat on May 2012. Now that 264 is considered the standard MARC field for publication information when cataloging according to RDA OCLC thought it would be worth pursuing converting the 260 MARC field in RDA records to 264. There are currently 12+ million records coded as RDA in WorldCat. Out of those records 1.5 million of them have a 260 MARC field. The WorldCat Metadata Quality Division will be correcting those 1.5 million records to have the appropriate MARC tag 264. OCLC reached out to the Program of Cooperative Cataloging (PCC) community to hear their opinions about the possibilities of doing this conversion project to RDA records in WorldCat. Some PCC members voiced concerned on the complex production/publication situations and CJK records. We have considered these concerns and will be analyzing complex 260/264 field conversions carefully as well as will be working closely with the CKJ OCLC Users Group to analyze CJK records. At this time, there are no plans to convert non-RDA record with a 260 MARC field to 264. Records that will be candidates for the project will have to be coded with a $e rda in the 040 MARC field and have a 260 MARC field. Complex 260/264 MARC field scenarios such as a 260 MARC field with a publication and copyright date (e.g. $c 2012, ©2011) will be worked out carefully to be converted to the correct 264 _1 2012 and 264 _4 ©2011. The 260/264 conversion project will help make data more consistent we expect to work on this project in the Spring and have it completed by the end of the calendar year. An announcement on OCLC-CAT will be posted once this work is underway. If you wish to obtain records with your holdings that change, you can receive them through Bibliographic Updates, a service available to everyone with a cataloging subscription through Collection Manager.

Member questions
260 to 264 Conversion

Will there be a Connexion macro for updating 260s in bib records manually when upgrading them to RDA? (Is there one already?)

Answer: There is not a macro yet to update the 260 field when upgrading records to RDA. This is something that can be considered in the future.

If you change the 264 to 2 264s and one has a copyright date, will you also update the 008-date type to "t" and add the copyright date to 008 Date 2?

Answer: Records should already have this information coded in the 008.

Will distribution data in 260 fields be mapped to 264 _2 fields?

Answer: Yes.

Will this be only for $b eng in the 040? or it will be done to all languages in the 040?

Answer: At this time, we will begin with $b eng cataloged records. It is possible that other language of cataloging will go through the conversion process in the future.

Won't there be an issue with hybrid records that continue to be input?

Answer: No, since the records that are being targeting are all coded as RDA. Hybrid records will not be considered for this project.

Will 260 convert to 264 _1 even if material is manuscript (which might be unpublished)?

Answer: Yes, manuscript materials will be managed separately and coded accordingly.

Will there be any flagging of RDA records with 260s that cannot be updated automatically by the conversion project?

Answer: Yes. Records that cannot be changed automatically will be processed manually by WorldCat Metadata Quality staff.

When you get new bib records from uploading institutions that are not RDA, is there a macro to convert those 260s to 264s?

Answer: No. We will not be converting 260 to 264 when records are not coded as RDA.

How far back in years would you be converting 260 to 264?

Answer: As long as the record is coded in RDA and has 260 field it will be changed through this automated process.

For CJK records, will OCLC share some testing examples to review?

Answer: Yes. For Chinese, Japanese, and Korean (CJK) records we will be working closely with the OCLC CJK Users Group to review these records.

Have you seen a trend in the occurrence of 260 on new RDA records?

Answer: Yes, as RDA has become more used in WorldCat records, there has also been an increase in the number of records that have a 260 field rather than a 264.

When using the workforms for new records, the 26x field doesn't fill in as 264. Can that be changed?

Answer: The 26x was done purposefully to allow libraries to follow whatever content cataloging standards they wanted and continue using 260 if they follow AACR2 or 264 if they follow RDA. At this time there is no plans to change workforms since OCLC Connexion is no longer being enhanced. You could use a constant data record as a workaround for the workform.

Are there any other 26X projects under consideration, e.g., recording of place of publication in the 008 based on recognized 26X data?

Answer: There is a possibility for this as a future project. There are some complexities to this as a city may have the same name in various countries to change the fixed field can become tricky.

264 fields, when is it appropriate to have the original copyright date in the second 264 field instead of the current copyright date? I have seen records with the current date, some with the current and original, and others with the current copyright with a 500 field listing the original copyright.

Answer: You will have to look at the LC PCC PS for this but past practice would have you ignore the renewable copyright dates.

General questions
Merging/Reporting Duplicates

Why it is that reporting dups takes so long? What it is the ETA?

Answer: It does take some time to process due to the number of duplicate requests we receive. Currently our backlog goes back to 4 to 5 months depending on the format.

Speaking of duplicate records… any plans to delete multiple very minimal vendor records?

Answer: We currently run macros to merge duplicate vendor records.

We used to get an automated message when duplicates were reported. Can this be reinstated for catalogers' record keeping?

Answer: If you use the OCLC Connexion function "Report error" it will send you an email with your request and you can track the requests you sent.

I have noticed a merging of OCLC records where the pub. and/or copyright dates do not match under the master record they are merged into. Can you explain this?

Answer: We would need the OCLC records that got merged in this scenario to investigate if a possible incorrect merge occurred. The DDR software that merges records follows a set of rules and each incorrect merge needs to be looked in a case by case basis. Please report incorrect merges to bibchange@oclc.org.

What's the current advice on editing or deleting FAST headings when making a change to the LCSH heading they are derived from?

Answer: A monthly process monitors additions or changes to LCSH and makes applicable changes to FAST headings. Because of this, catalogers do not need to edit FAST headings when they change LCSH. If a cataloger would like to change the FAST headings, this is okay, and the monthly process will look at those changes, updating or correcting the FAST headings as necessary. However, with cataloger entered changes, no attempt will be made to synchronize the LCSH and FAST headings. This message was originally sent to the PCCLIST on 30 May 2017.

Any possibilities to have a special form to report duplicate with boxes for needed fields that will make the process easier?

Answer: Yes, we have a web form similar to what you are asking. You can access it here: https://www.oclc.org/forms/record-quality.en.html

When using report record function in OCLC, include both OCNS?

Answer: When using the Connexion "Report Error" function all you need to do is include the duplicate OCLC record number to the record you have in display. This function shows us the record in question and all you need to do is include the duplicate OCLC number.

BFM

I've occasionally reported a need for batch correction and control of a heading (e.g., 50+ bib records). Is this a reasonable request? Are there conditions that make such requests unreasonable?

Answer: These are allowable requests as the WorldCat Metadata Quality staff uses macros to help update headings.

6xx Fields

I have noticed in a lot of records for fiction works that there are genre headings in 650 fields. I thought they were supposed to go in the 655 field. These headings are LCSH that is being used as a genre heading. Have I missed some communication that says it's OK to put LCSH that is being used as genre headings in the 650 field?

Answer: We recommend you follow LC's practice. LC has not terminated the genre use of LCSH in 650 fields. You can use both the still-correct LCSH genre term and an LCGFT 655.

I've noticed a lot of records for adult books with 650 _ 1 subject headings. or 651 _ 1 subject headings. Do you know why this is happening?

Answer: This is due to the new data sync process where subject headings from different thesaurus are transferred to records if they don't exist. We are aware of this issue and are working on getting it resolved.

What if we had a text file of OCLC numbers and then sent that and asked, can genre heading X be added to all these records? Is that an OK bib change request?

Answer: You can send this type of request but we will have to manually verify each record to make sure that the genre heading is appropriate to add.

What's the current advice on editing or deleting FAST headings when making a change to the LCSH heading they are derived from?

Answer: If changes have been done to the LCSH headings in a record you do not need to do anything with FAST. They will automatically update the headings based on whatever LCSH the record now has.

In addition to controlling LCGFT genre terms, does OCLC have any plan to control AAT for art genre terms which are quite widely used worldwide?

Answer: At this time, we do not have plans to implement the AAT vocabulary for controlling.

We noticed that if one subject heading doesn't match an authority record, then no FAST is generated even if the other headings are established. Is there a reason why FAST isn't added for the ones that match something in the authority file?

Answer: This is another area to stay tuned for as FAST will be changing some of these mechanisms in the future.

RDA

I've noticed hundreds of RDA-coded vendor records with 260 and no 33X. Will there be an attempt later to also add the 33X?

Answer: We are continuing to constantly add 33x fields to records in WorldCat. These records will eventually be targeted for conversion.

Is there a deadline for no longer cataloging new records using AACR2 standards?

Answer: No. The WorldCat database will continue accepting AACR2 and are not requiring libraries to switch to RDA.

Dates

If there are 2 dates in a resource, one a publication date and one a copyright date, AND they are the same, how are the fixed fields for Date Type and Dates to be coded?

Answer: You can code the date type as "s" for single date and just have the one date for publication or you can code the date type as "t" for publication and copyright date and include both dates even if they are the same (e.g. 2017, 2017).

Class numbers

What is the issue with duplication of 084 field copying the 082 field? I have seen this on some DLC records.

Answer: The 084 field may be transferring when records are merge automatically by the Detection Duplications and Resolution (DDR) software. We have been correcting these records when we come across them by removing the 084 field. You can report them as well to bibchange@oclc.org**.**

Connexion Software

Do you have a timeline for the new metadata editor that will replace Connexion?

Answer: At this time, we do not know when Connexion is going away. The new metadata editor is Record Manager and if you have a cataloging subscription you can begin using it at your convenience I have noticed a merging of OCLC records where the pub. and/or copyright dates do not match under the master record they are merged into. Can you explain this?

WorldCat Metadata Quality

What kind of coordination between batchload and QC happens to try to cut back on errors coming through batchload records?

Answer: The WorldCat Metadata Quality staff and Data Ingest specialist interact constantly. Whenever we receive requests for corrections to records that may have been loaded through data sync we make sure to communicate these issues with the data ingest specialist.

Can QC search WorldCat for values that are not indexed? For example, can we ask you to do a query on the 250?

Answer: Yes, we do have tools that can search for fields that WorldCat does not index.

Identifiers

Many in the community have been eagerly awaiting integration of ISNIs in 024 fields in the authority file. Now that LC has announced there is not an active project to do so in the NACO file, would OCLC consider a project within the authority file it hosts?

Answer: OCLC has a copy of the Name Authority File (NAF) but the file belongs to the Library of Congress (LC). OCLC cannot integrate ISNIs in name authority records and must get make a resolution with the Library of Congress and PCC members to make changes like these to name authority records.

Is there any internal discussion to integrate VIAF within the new metadata editor as another authority resource?

Answer: At this time no but we can bring forth this idea to the VIAF team in OCLC.

Will $0 be implemented on those fields that are "controlled"? Or will it be suppressed from bib records coming in via batchload or ingest?

Answer: We are currently developing practices and policies that will be used with $0 and $1 so please stay tuned!