# 2018-06-27 Virtual AskQC Office Hours

## Topic presentation

What is the Expert Community? presented by Cynthia Whitacre

Cynthia Whitacre (Manager, Metadata Policy) presented on the topic: What is the Expert Community? The presentation provided a definition on the concept, its history, capabilities and restrictions of the expert community, and resources where catalogers can learn more the expert community.

The expert community is a crowd-sourcing quality control function that allows catalogers from OCLC member libraries to improve almost all WorldCat master bibliographic records. The first iteration of the program began in 1983 what was then called the enhance program. The enhance program allowed libraries to apply to obtain special capabilities of modifying records in a specific format (e.g. books, maps, and serials). Libraries had to apply and were required to go through a review process where they submitted revised records for OCLC staff to review. Only through this process were libraries certified and would become contributors to the enhance program. Two years after the enhance program, the Minimal Level upgrade functionality was introduced, which allow any member library the ability to enhance less than full or minimal level records, encoding level 3 or K. In 1991 the database enrichment program permitted libraries to include the addition of certain metadata elements such as call number, summary notes, subject headings, content notes, and other fields that were lacking in the master bibliographic record. Finally, in 2009 there was a 6-month experiment called "Expert Community" which consisted of extensive evaluation by OCLC Metadata Quality staff, where changes to master bibliographic records were analyzed to determine if it was a positive or detrimental change. The experiment concluded that the changes to bibliographic records were mostly positive, where corrections and additions were being done in a timely manner to fix bibliographic record problems. The experiment was deemed a success and the Expert Community became the successor of the Enhance Program. Even though the Expert Community replaces the Enhance Program the National level enhance still exists today for certain OCLC member libraries to correct Program for Cooperative Cataloging (PCC) records. You can learn more about the entire history of Expert Community in the newly revised Chapter 5 of Bibliographic Formats and Standards.

The expert community has always been intended to acknowledge the wealth of knowledge that catalogers can share in WorldCat, as we already do in listservs and social media channels. All catalogers can make an impact to the WorldCat database due to the Expert Community. Connexion and Record Manager users who have full level cataloging authorization or higher can make corrections to master bibliographic records. Regardless of the edit, your contribution helps improve the master bibliographic record for other catalogers to use. Whether it be correcting a typo or adding metadata elements relevant to the resource, WorldCat greatly benefits when its members correct or enhance records.

Catalogers can do almost anything to any master bibliographic records because of Expert Community. There are only a few fields that catalogers cannot change in a master bibliographic record. These MARC fields are: 019 (contains the OCLC control numbers of merged records), 029 (control numbers to specific large libraries loads, that are used for matching), 938 (contains vendor information supplied in OCLC), 040 $c and $d (the OCLC institution symbols that create or modify a bibliographic record). Besides these fields you can change essentially anything in non-PCC records. Another restriction in expert community are CIP records where you cannot change the encoding level 8 but can modify any other part of the record. Encoding level 8 must stay on CIP records due to the overlay process that occurs when national libraries and vendors send their full encoding level record to WorldCat; code 8

allows that overlay to happen. Libraries also have restrictions on editing CONSER (continuing resources and serials records) or BIBCO (non-serial and monographic records), both types of records can be identified by a "pcc" code in the 042 MARC field. Even though CIP, BIBCO, and CONSER records have certain restrictions, the Expert Community can enrich these records by adding metadata that is not already present in the record (e.g. adding summaries, content notes, call numbers, and subject headings in schemes that are not present).

You can learn more about the expert community be reading the resources below. Please note that the last two links are a little outdated, but we are hoping to have this content current later in the year.

- [Chapter 5 of OCLC's Bibliographic Formats and Standards](#)
- [Expert community guidelines](#)
- [Expert Community Frequently Asked Questions (FAQs)](#)

Some of the examples of FAQs that you will see in the last link are "Can I improve and update records in all formats? Can I add URLs to mater records? Both answers to these questions are yes! Do I need to lock the master record before I replace? The answer to this question would depend on the interface you are using for cataloging. Are there special considerations for non-Latin scripts? More information on this question can be found in the document, so we highly encourage you to view it.

The expert community is founded on the principles that catalogers should try not to do harm to bibliographic records and if in doubt of the change you are considering, it's best not do it. You can read more about these principles in the second link, Expert Community Guidelines. Also, remember to never remove accurate or correct information in a master bibliographic record, never change the basic nature of the master bibliographic record to represent something else, and never make changes to the master bibliographic records that follows local practices or includes local metadata fields. Be cautious of changing a master bibliographic record that has a different language of cataloging than you use and changing a metadata element in a master bibliographic record that is based on cataloger's judgement. Please behave responsibility when editing records and avoid starting "editing" wars with other catalogers. OCLC entrusts its member libraries to do the right thing in editing master records.

Finally, if you would like to join us to talk more about expert community, you are welcome to the ALA conferences where we hold the OCLC's Expert Cataloging Community Sharing session. These events are usually held from 10:30 to noon on Friday. They are coordinated and moderated by Jay Weitz. Several staff members of OCLC Metadata Quality also attend. Attendees are welcome to ask any questions, as we do with the AskQC office hours. The notes from the meetings are also widely distributed in the listservs afterwards.

## Member questions
### Expert Community Questions

**What ability to libraries have of adding non-Latin scripts to existing master bibliographic records?**

Answer: Libraries are welcome go back and add non-Latin scripts to any master bibliographic records because of expert community. They will be parallel fields and are a great addition to records. This is especially a good time to add non-Latin scripts to records since OCLC accepts all Unicode, which allows more languages to be used in WorldCat.

**Are all users with Full level authorization automatically in this expert community?**

Answer: Yes.

**Should changes to a bibliographic record's main entry always be regarded as arguing with another cataloger's judgment and therefore avoided, or are there cases where changing a main entry would be correct (e.g., to align a bibliographic record with an LCNAF authority for the work or expression)?**

Answer: Would be a matter of cataloger's judgement but if you are certain that a change needs to be done to correct the record, especially in the case of wanting to change the form of the name or title in an access point to match the LCNAF, it would be right to do so. When you are changing the main entry of the record due to a cataloger mistakenly placing an editor in a 100 field, make sure to move that access point to a 700 field and not delete it completely.

**Do you have data on the kinds of Expert Community changes that are being made and in what proportions to the total?**

Answer: We do keep monthly statistics and have a record of those. These statistics are broken down by type of changes that were done in the past such as minimal level upgrades or database enrichment. We are not able to get too granularly on the exact change that was done to the record and we currently do not have numbers we can share on this.

**How does OCLC prefer handling errors for which no proof is available, e.g. a supplied publication date in 260 $c that precedes the author's birth date?**

Answer: As part of the expert community you can make this change. If you have the item in hand and are sure that the change is correct to do, please go ahead and make the change. If the record is PCC then please send us whatever proof you have in order for us to see if we can make the change. If we do see something that is obviously wrong, like a publication date that proceeds the author's birthdate, we would do some research to see if we can infer what is the correct metadata for the record.

**If a library enhances a bib record with a 490 0 to 490 1 plus 8XX, is that appropriate or is that just disagreeing with another cataloger's judgment?**

Answer: We think it is appropriate, especially if you check it in the LC/NACO authority file and find an authorized series access point. If it is not in the authority file but your library wants to add an 8xx field, that would be cataloger's judgment and it's okay to do so as other libraries would find that helpful.

**When upgrading an AACR2 record to RDA, should the 500 Compact disc note be retained (as an example of "do no harm") - RDA does not specifically call for such a note.**

Answer: You can take out that note if your upgrading the record to RDA. The compact disc note was discontinued in AACR2.

## General Questions

**Do you have any update about the 520 fields that have been added to the wrong records? I sent a message to the Bibchange email address about a record over a week ago (to see if there was a bigger problem that the record might help identify), but the master record has yet to change. Can/should I update the record myself?**

Answer: We are aware of the problem with data transfer and we are looking to have this resolved. We are also correcting these records so if you do come across issues like these please go ahead and send them to bibchange@oclc.org. We would like to be able to identify who is the source behind the incorrect data transfer and make sure we are aware of all the records that were affected to later correct them all.

**Sometimes I find records in which the 040 $b does not match the actual language of cataloging (e.g., 040 $b is spa but notes/description are in English). Would you prefer we change the 040 to make it match the record, report it to OCLC as an error and input a new record if necessary, or something else?**

Answer: If the record is clearly in one language that is not reflected in the $b of the 040 MARC field please feel free to go ahead and correct the language of cataloging code in $b. Make sure to consider all the descriptive fields such as 300 and 5xx fields. The subject headings being in a different language does not count in this situation though. If you think changing the 040 $b of the record would drastically make the record different do not hesitate to report this to us at bibchange@oclc.org and we can determine what is the best course of action to take.

**Does it make a difference whether it appears the original inputting library miscoded the 040 $b versus another library has come along and possibly hybridized the record so now there's a mismatch or conflicting languages of cataloging?**

Answer: This would be cataloger's judgement and if it is to difficult to decide on what is the appropriate action to take it would be best to go ahead and report the record to bibchange@oclc.org to help make the correction.

**You mentioned language of cataloging other than English. People in English-speaking regions might be advised that it would likely be preferable to derive a CatL:eng record rather than work with the other-language-of-cataloging record.**

Answer: Correct, even if a record is in a language of cataloging that is not used in your institution you can still use the record by deriving it and making a new master bibliographic record that follows English language cataloging practices.

**Regarding 856 2nd indicator 0 (zero), Bib formats says: "Resource. The electronic location in field 856 is for the same resource described by the record as a whole. In this case, the item represented by the bibliographic record is an electronic resource. If the data in field 856 relate to a constituent unit of the resource represented by the record, use subfield ‡3 to specify the portion(s) to which the field applies. The display constant Electronic resource: may be provided." Does the sentence about "constituent unit" mean that indicator zero "0" should be used for tables of contents or chapters or other portions of the work represented by the record. I thought 2nd indicator zero "0" means that the link goes to an electronic copy of the entire eBook.**

Answer: Ideally yes, a second indicator 0 in an 856 field would indicate that the entire resource is available on the web. The second indicator 0 does not imply anything about the resource being freely available or behind a pay wall. It just indicates that the resource is available at this link. For multivolume sets or serials records that provide separate links to each volume or issue it is still appropriate to have a second indicator 0 because you will be obtaining the whole volume or issue for that multipart or serial.

**I see Chinese libraries inputting records with 040 $b eng, but it is clear they are not using our cataloging guidelines or LC transliteration. Should we input a new record or try to work with that record.**

Answer: We would suggest that you try to work with that record if the vendor or library intended to use this record for English language cataloging conventions. You can upgrade them to the guidelines that you are using since these institutions are not required to use RDA.

**Duplicates, do you have a preference on how we choose which duplicate to use/enhance and which to consider a duplicate? First inputted, most holdings, best (i.e., needs the least work)?**

Answer: We try to use the record that needs the least amount of work and is most complete. In most cases it would be a PCC record, but you do not have to feel obligated to choose a record for us to retain. When we are merging we follow a hierarchy like DDR that helps us determine which record should be retained. Users can just send us the duplicates and we will make the choice. Generally, we also keep the record with the most holdings.

**Would it be wrong to use 856 40 for a link to a table of contents, index, or chapter, when the MARC record is for the entire book?**

Answer: If its just a link to a table of contents or index it would be inappropriate to use a second indicator 0. In those cases, you would use second indicator 1. For a chapter in a book that would be more difficult to determine, and it would be a cataloger's judgement call to decide if indicator 0 is appropriate.

**Can you talk about the difference between (1) 650 second indicator 4 and (2) 653? I see 650s that don't appear to follow any controlled list.**

Answer: The definition of second indicator 4 is that's is a local vocabulary that is not following a controlled list. If there are duplicates of subject access points, this is not useful, and it would be appropriate to remove the 650s with second indicator 4. If they are different then it may be helpful to keep them in the record. 653 holds uncontrolled headings that are not related to any list which go beyond the topical. 650s would be generally held for topical headings but 653s holds any information from subjects to names. 650 second indicator 4 is also structured in some way, unlike the 653 which are just keywords. You wouldn't be able to use subdivisions in 653s.

**I see 650 #4 $a Electronic books in almost all records for electronic resources. Why is this used instead of 655 #0 $a Electronic books?**

Answer: LCSH "Electronic books" doesn't have a scope note to help us determine if it can be used as a genre, so judgment applies, if it falls under the category of "disciplines in which LCGFT authority records have not yet been made." If not, then the local 655 would be appropriate (using _4). This response was derived from LC's "Frequently Asked Questions about Library of Congress Genre/Form Terms for Library and Archival Materials (LCGFT)" https://www.loc.gov/catdir/cpso/genre_form_faq.pdf document.

**If I'm correcting a name access point to an authorized form and it has a parallel vernacular 880 field, what if anything should I do with the parallel field?**

Answer: Unless you have the script and language expertise of that vernacular field it would be better to leave it alone.

**Has 655 0 been redefined from LCSH to LCGFT?**

Answer: No. LCGFT would be identified by second indicator 7 and $2 lcgft.

**When would you use a 720 field?**

Answer: It is not recommended to use this field, they are intended for conversion of bibliographic data by a machine and not humans. They are not properly differentiated access points as you would see done by human catalogers. If a cataloger sees a 720 field and can appropriately determine what it is trying to represent, then go ahead and correct it to the correct form of the LC/NACO authority file and move it to a 100 or 700 field.

**We cannot link to our ebooks from our record (due to IT set up). Does it matter which field I put a note about accessing this resource?**

Answer: If the record is going to be in your local catalog this note can be anywhere in the record. We would prefer for you to please not add this information in the master bibliographic record. You can put this information in the local holdings record as well or in the 956 which is the locally defined equivalent of the 856.

**If a bib record has bad tagging (e.g, pagination data in 260 and 260 $b data in 260 $a, lack of 245 $c, etc.), is it better to correct the tagging or report the bad record as a duplicate?**

Answer: Don't spend your time correcting it if you know this record is a duplicate. Go ahead and report it to bibchange@oclc.org. If the record is not a duplicate, then please go ahead and correct it.

**What is the difference in 040 between OCLCQ and OCLCA?**

Answer: You can learn more about the different OCLC specific symbols used in WorldCat by checking out the latest updates from chapter 5.4 of Bibliographic Formats and Standards: https://www.oclc.org/bibformats/en/quality.html#worldcatmetadataqualityactivities. OCLCQ is for WorldCat Metadata Quality, it appears whenever changes in the record are done, whether automatically or manually by Metadata Quality staff. OCLCA is the automated process where a controlled authorized access point in a bibliographic record is updated to match changes to an authority record (OCLCO is similar to OCLCA).

**I thought I heard a comment in passing about Connexion ending but I can't find any information. Is there any information or did I hear incorrectly?**

Answer: There is no end of life date for Connexion. Some day Connexion will end and its successor is Record Manger. You can already begin using Record Manager now. When there is an end of life date of Connexion we will make sure to notify way in advance. Connexion is not being developed anymore though. All the functionalities upgrades are being done in Record Manager.

**I searched for a record by ISBN and the same record (OCN) appeared twice in the results list. Why is this happening?**

Answer: This is an indexing issue. Please go ahead and send us the OCN number that is being display twice in your results list to bibchange@oclc.org. We will re-index the record which will clear up the issue.

**Is there any Expert functionality now that is missing from Record Manager? e.g., controlling headings.**

Answer: There are some functionalities that are being added to Record Manager one of them being controlling headings.

**How about a vendor that uses Connexion for authority work?**

Answer: Record Manager will be able to sustain the work that is done with authorities. Both vendors and libraries will be able to continue doing their work in the LC/NACO authority file through Record Manager once Connexion ceases to exist.

**Can you use macros to clean up the OCLC records in Record Manager?**

Answer: At this moment no, but we are hopefully that a new mechanism will be built in Record Manager to help us modify large amounts of records. There are some functions in Record Manager that mimic current macros in Connexion such as taking a print version record and converting it to an electronic version record. There at least about 5 to 7 advance functions available in Record Manager.

**When the new authorities coding changes talked about at ALA get introduced, will they cause validation errors in Connexion?**

Answer: Whenever there are changes in MARC coding it will continually be changed in our systems, regardless of the interface changes that are being done on the front end. Jay manages the MARC update which will be done in the next 6 months (we will be implementing the 2018 MARC update). We will be publicized the changes in the MARC coding and additions through our technical bulletin.

**I can copy multiple fields from a record in Connexion Client into a Word document, for such purposes as editing them, transferring them to another master, etc. Can you copy in this way from a record in Record Manager?**

Answer: This question would be better addressed to Customer Support at support@oclc.org. We try our best to answer Record Manager questions but the AskQC sessions are more focused on cataloging questions and Record Manager questions can be sent to Customer Support who will forward it to the appropriate department.

**Has the update to BFAS meant that all Technical Bulletins previously issued are now obsolete?**

Answer: No. Technical Bulletins' are valid and not obsolete until a certain point in time. We try each year when a technical bulletin is issued to update BFAS and incorporate those updates to the document.