Virtual AskQC Office Hours

Punctuation updates and policies

OCLC Metadata Quality

March 2020

Housekeeping

- This session is being recorded

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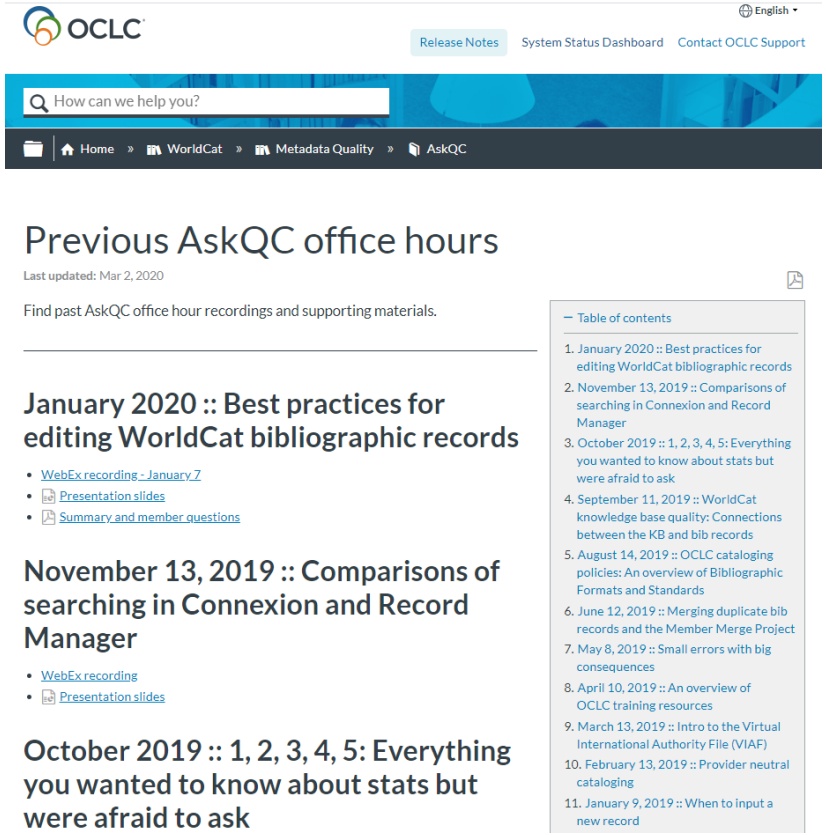
- All session recordings, slides, and notes are available at oc.lc/askqc



Housekeeping

- This session is being recorded
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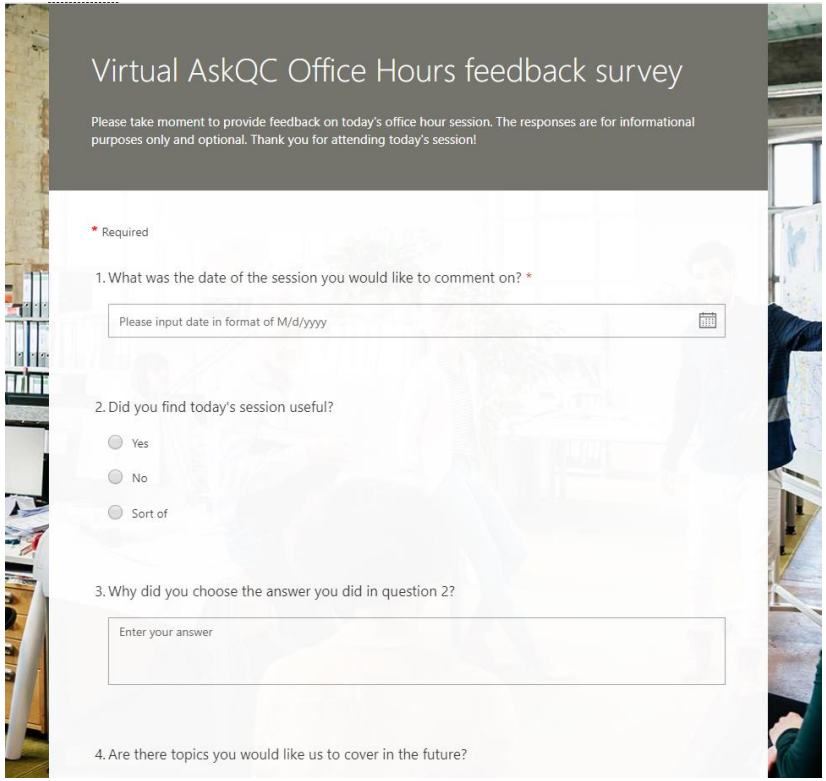
- After the session, you will be directed to a brief, optional survey



One the call today

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Robin Six

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Punctuation Updates and Policies

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Senior Consulting Database Specialist

Introduction

- Discussions on removal of ISBD punctuation in MARC records began within the Program for Cooperative Cataloging (PCC) about 10 years ago
- Rationale for removal:
  - Eliminates redundant coding, e.g., 245 $c and space-slash-space mean the same thing
  - Easier to create records
  - Other MARC formats do not include punctuation
  - Data easier to map in and out of MARC, e.g., MARC to BIBFRAME and BIBFRAME to MARC

Terminology

- ISBD punctuation – we are really talking about all punctuation that coincides with MARC coding not just punctuation prescribed by the ISBD standard
- Final punctuation – this refers to terminal periods, typically at the end of fields
- Medial punctuation – punctuation occurring at the end of a subfield often signaling what kind of data is found in the next subfield
- Minimal punctuation – a record created without most punctuation, but not necessarily all punctuation, omitted = without punctuation

PCC Policy

- PCC Policy on Minimal Punctuation
  - In September 2019, PCC approved a policy to allow PCC participants to authenticate minimally punctuated MARC bibliographic records. This policy was implemented in January 2020

- See the full policy on the PCC website at www.loc.gov/aba/pcc/

PCC Policy

- PCC policy allows for:
  - Inclusion of punctuation in RDA records (Leader/18 (*Desc*) = i)
  - Omission of final punctuation in RDA records (Leader/18 (*Desc*) = i)
  - Omission of final & medial punctuation in RDA records (Leader/18 (*Desc*) = c)

- Newly created PCC records may be entered directly into the database with minimal punctuation

PCC Policy

- PCC catalogers should ensure punctuation is consistent within a record and matches the Leader/18 (*Desc*) encoding before authenticating it, i.e., adding 042 pcc

- PCC catalogers should not convert existing PCC records from full punctuation (Leader/18 (*Desc*) = a or i) to minimal punctuation (Leader/18 (*Desc*) = c), or from minimal punctuation to full punctuation

OCLC Policy

- Previous OCLC policy was outlined in BFAS on the page for *Desc*
- Previous OCLC policy preferred use of full punctuation, e.g., if you found a record lacking punctuation, you were okay to add punctuation and replace the record

- New OCLC policy is outlined in BFAS 2.8 is similar to PCC practice
- New OCLC policy allows you to create records with or without punctuation separating elements of the description which coincide with subfield coding

OCLC Policy

- If you find an existing record that omits punctuation, do **not** add punctuation and replace the master record
- If you find an existing record that includes punctuation, do **not** remove the punctuation and replace the master record
- In either case, you may edit the record for local use as needed

OCLC Policy for Records with Minimal Punctuation

- Omit punctuation at the end of the preceding subfield in most cases
- Omit parentheses around geographic coordinates and series statements as well as qualifier subfields in fields other than access points
- Omit terminal periods following the displayed text unless the field ends with an abbreviation or initial (Currently, the control heading process adds terminal periods to access points – to be fixed in the future)
- Supply punctuation within the text of any subfield as needed per cataloging instructions used to create the record
- Supply punctuation within authorized access points per the practice used in the related authority file
- Code *Desc* with *c* or *n* for records with minimal punctuation

Coding *Desc* and Field 040

- RDA record with minimal punctuation:

  Desc c *(code c rather than i)*

  040 XXX ǂb eng ǂe rda ǂc XXX

- AACR2 record with minimal punctuation:

  Desc c *(code c rather than a)*

  040 XXX ǂb eng ǂe aacr/2 ǂc XXX

- Pre-ISBD records with minimal punctuation would be *Desc n*

Omitting Final Punctuation

- Omission of terminal periods is now optional for records with punctuation
- Terminal periods are always omitted in records with minimal punctuation
- Retain any periods following initials or abbreviations

Omitting Final Punctuation—Examples

504 Includes bibliographical references.
504 Includes bibliographical references

500 "First edition published by Routledge 2012."
500 "First edition published by Routledge 2012"

655 7 Portraits. ǂ2 fast ǂ0 (OCoLC)fst01423831
655 7 Portraits ǂ2 fast ǂ0 (OCoLC)fst01423831

Omitting Medial Punctuation

- General Rule—Omit punctuation from the end any subfield, i.e., omit the punctuation if a MARC subfield code follows

- Exceptions include some punctuation in access points, some punctuation that is to be relocated, and some punctuation that is to be retained

Omitting Medial Punctuation—Examples

245 10 Citrus bergamia : ǂb bergamot and its derivatives / ǂc edited by Giovanni Dugo, Ivana Bonaccorsi.
245 10 Citrus bergamia ǂb bergamot and its derivatives ǂc edited by Giovanni Dugo, Ivana Bonaccorsi

264 31 ǂ3 v. <10>-78: ǂa Dordrecht ; ǂa Boston ; ǂa London : ǂb Kluwer Academic Publishers
264 31 ǂ3 v. <10>-78 ǂa Dordrecht ǂa Boston ǂa London ǂb Kluwer Academic Publishers

Omitting Medial Punctuation—Examples

300 271 pages : ǂb illustrations ; ǂc 21 cm + ǂe 1 atlas (37 pages : color maps ; 37 cm)
300 271 pages ǂb illustrations ǂc 21 cm ǂe 1 atlas (37 pages : color maps ; 37 cm)

776 08 ǂi Online version: ǂa Williamson, John Harvey, 1937- ǂt Born on the links. ǂd Lanham, Maryland : Rowman & Littlefield, [2018] ǂz 9781538114537 ǂw (DLC) 2018003471
776 08 ǂi Online version ǂa Williamson, John Harvey, 1937- ǂt Born on the links ǂd Lanham, Maryland : Rowman & Littlefield, [2018] ǂz 9781538114537 ǂw (DLC) 2018003471

Relocating Medial Punctuation

- Some subfields are ambiguous without the preceding punctuation, e.g., 245 $b can contain other title information, parallel titles, or second, third, fourth title, etc., for a work lacking a collective title

- Relocate ISBD mark of parallel language information

- Relocate ISBD punctuation related to combined works

Relocating Medial Punctuation—Examples

245 10 Itinerarios de lectura = ǂb A journey in readership : homenaje a Cathy L. Jrade.
245 10 Itinerarios de lectura ǂb = A journey in readership : homenaje a Cathy L. Jrade

245 10 Saigū no bungakushi = ǂb The literary history of Saigu = Zhai gong wen xue shi / ǂc Motohashi Hiromi.
245 10 Saigū no bungakushi ǂb = The literary history of Saigu = Zhai gong wen xue shi ǂc Motohashi Hiromi

Relocating Medial Punctuation—Examples

245 10 Oklahoma! ; ǂb Carousel ; South Pacific / ǂc Rodgers & Hammerstein.
245 10 Oklahoma! ǂb ; Carousel ; South Pacific ǂc Rodgers & Hammerstein

245 14 The rite of spring ; ǂb Petrushka / ǂc Stravinsky.
245 14 The rite of spring ǂb ; Petrushka ǂc Stravinsky

Retaining Integral Punctuation

- Retain internal ISBD punctuation that appears within a subfield, i.e., when there is no separate subfield available.
- For example:
  - Space-equals-space used to indicate parallel language information within 245 $b
  - Space-semicolon-space used to separate one statement of responsibility from another within 245 $c
  - Space-semicolon-space used to separate extent from size within 300 $e

Retaining Integral Punctuation—Examples

245 10 The Colorado curveball / ǂc by David A. Kelly ; illustrated by Mark Meyers.
245 10 The Colorado curveball ǂc by David A. Kelly ; illustrated by Mark Meyers

245 14 Les Ballets jazz de Montréal : ǂb au gré des rencontres depuis 40 ans = encounters in motion 40 years on.
245 14 Les Ballets jazz de Montréal ǂb au gré des rencontres depuis 40 ans = encounters in motion 40 years on

Retaining Integral Punctuation

- Retain punctuation that is integral to the data no matter where it appears
- For example:
  - Transcribed punctuation (e.g., exclamation points, question marks)
  - Periods following abbreviations and initials (e.g., Jr**.**, in**.**, Inc**.**)
  - Serial commas (e.g., one**,** two**,** three)

Retaining Integral Punctuation—Examples

245 10 Why did America go wild over the Beatles? / ǂc by Bro. Maze.
245 10 Why did America go wild over the Beatles? ǂc by Bro. Maze

300 2 audio discs (1 hr., 20 min., 3 sec.) : ǂb digital, CD audio ; ǂc 4 3/4 in.
300 2 audio discs (1 hr., 20 min., 3 sec.) ǂb digital, CD audio ǂc 4 3/4 in.

Retaining Punctuation in Access Points

- Retain punctuation that appears within access point fields, except for final punctuation and punctuation that separates the access point from the relationship information or series volume numbering
- Text string in the access point, including its punctuation, should match the text string in the corresponding authority record
- Retain punctuation separating names and titles in name-title access points

Retaining Punctuation in Access Points—Examples

100 1 Bauman, Jon W. ‡q (Jon Ward), ‡d 1939-2009, ‡e author.
100 1 Bauman, Jon W. ‡q (Jon Ward), ‡d 1939-2009 ‡e author

711 2 Gettysburg Seminar ‡n (9th : ‡d 2002 : ‡c Gettysburg, Pa.), ‡j author.
711 2 Gettysburg Seminar ‡n (9th : ‡d 2002 : ‡c Gettysburg, Pa.) ‡j author

Book Record—With Punctuation

100 1 O'Rourke, John ǂc (Graphic novel writer), ǂe adapter.
245 14 The Oregon trail / ǂc Francis Parkman ; illustrated by Henry C. Kiefer ; adaptation, John O'Rourke.
264 1 Newbury, Berkshire : ǂb CCS Books, ǂc 2017.
300 48 pages : ǂb chiefly color illustrations ; ǂc 25 cm.
490 1 Classics illustrated ; ǂv no. 65
700 1 Kiefer, H. C. ǂq (Henry Carl), ǂd 1890-1957, ǂe illustrator.
700 1 ǂi Adaptation of (work): ǂa Parkman, Francis, ǂd 1823-1893. ǂt Oregon Trail.
830 0 Classics illustrated (Newbury, England). ǂp Joint European series ; ǂv 65.

Book Record—Without Punctuation

100 1 O'Rourke, John ǂc (Graphic novel writer) ǂe adapter
245 14 The Oregon trail ǂc Francis Parkman ; illustrated by Henry C. Kiefer ; adaptation, John O'Rourke
264 1 Newbury, Berkshire ǂb CCS Books ǂc 2017
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830 0 Classics illustrated (Newbury, England). ǂp Joint European series ǂv 65

Map Record—With Punctuation

110 2 Cartographia Kft., ǂe cartographer, ǂe publisher.

245 10 Cairo = ǂb Kairo = Le Caire = Kairó / ǂc Cartographia, the map expert.

255 Scale 1:13,000 ǂc (E 31°12′30″--E 31°17′14″/N 30°04′37″--N 30°00′14″).

264 1 Budapest : ǂb Cartographia, ǂc [2011]

300 1 map : ǂb color ; ǂc 61 x 58 cm, on sheet 84 x 60 cm, folded to 21 x 11 cm

Map Record—Without Punctuation

110 2 Cartographia Kft. ǂe cartographer ǂe publisher

245 10 Cairo ǂb = Kairo = Le Caire = Kairó ǂc Cartographia, the map expert

255 Scale 1:13,000 ǂc E 31°12′30″--E 31°17′14″/N 30°04′37″--N 30°00′14″

264 1 Budapest ǂb Cartographia ǂc [2011]

300 1 map ǂb color ǂc 61 x 58 cm, on sheet 84 x 60 cm, folded to 21 x 11 cm

Videorecording Record—With Punctuation

245 00 Marchands à Venise = ǂb Merchants of Venice / ǂc un film de Hervé Beau ; réalisation, Hervé Beau ; montage, Hervé Beau, Emilie Berteau ; Vidémo.

246 1 ǂi Title on disc label: ǂa Merchants of Venice

264 1 [Ireland] : ǂb Planet Group Entertainment, ǂc [2020]

300 1 videodisc (49 min.) : ǂb sound, color ; ǂc 4 3/4 in.

700 1 Beau, Hervé, ǂe director.

Videorecording Record—Without Punctuation

245 00 Marchands à Venise ǂb = Merchants of Venice ǂc un film de Hervé Beau ; réalisation, Hervé Beau ; montage, Hervé Beau, Emilie Berteau ; Vidémo

246 1 ǂi Title on disc label ǂa Merchants of Venice

264 1 [Ireland] ǂb Planet Group Entertainment ǂc [2020]

300 1 videodisc (49 min.) ǂb sound, color ǂc 4 3/4 in.

700 1 Beau, Hervé ǂe director

Resources

- OCLC macros for use in Connexion Client
  - **PunctuationAdd** adds punctuation to fields in either a single record or all records in a local or online save file and adjusts the coding in *Desc* (Leader/18) and in field 040 as needed
  - **PunctuationDelete** removes punctuation from fields in a single record or all records in a local or online save file and adjusts the coding in *Desc* (Leader/18) and in field 040 as needed
  - Download at oc.lc/cat-downloads
- MarcEdit can be used for addition or removal of punctuation
- Some authority control vendors can add or remove punctuation

Resources

- OCLC *Bibliographic Formats and Standards* (oc.lc/bfas)

- PCC's Policy *Guidelines for Minimally Punctuated MARC Records* (www.loc.gov/aba/pcc/documents/PCC-Guidelines-Minimally-Punctuated-MARC-Data.docx)

- PCC's *Training for Minimally Punctuated MARC Bibliographic Records* at (www.loc.gov/aba/pcc/sct/documents/GuidelinesMinimallyPunctuatedMARC-SCT-2020-01.pptx)

What questions do you have?

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Thank you!

April Virtual AskQC Office Hours

Updates to record validation and the OCLC MARC

Tuesday, April 7 at 9:00 AM Eastern

Thursday, April 16 at 4:00 PM Eastern

Registration available at oc.lc/askqc

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

Session links available at oc.lc/askqc