

Virtual AskQC Office Hours

WorldCat validation
OCLC Metadata Quality
April 2020

Housekeeping

- This session is being recorded



Housekeeping

- This session is being recorded
- 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 language selector set to 'English', and navigation links for 'Release Notes', 'System Status Dashboard', and 'Contact OCLC Support'. Below this is a search bar with the text 'How can we help you?'. A breadcrumb trail indicates the current location: 'Home » WorldCat » Metadata Quality » AskQC'. The main content area features the heading 'Previous AskQC office hours' with a sub-heading 'Last updated: Mar 2, 2020'. A paragraph states 'Find past AskQC office hour recordings and supporting materials.' Below this is a list of recordings, with the first one selected: 'January 2020 :: Best practices for editing WorldCat bibliographic records'. This entry includes links for 'WebEx recording - January 7', 'Presentation slides', and 'Summary and member questions'. Other recordings listed include 'November 13, 2019 :: Comparisons of searching in Connexion and Record Manager', 'October 2019 :: 1, 2, 3, 4, 5: Everything you wanted to know about stats but were afraid to ask', 'September 11, 2019 :: WorldCat knowledge base quality: Connections between the KB and bib records', 'August 14, 2019 :: OCLC cataloging policies: An overview of Bibliographic Formats and Standards', 'June 12, 2019 :: Merging duplicate bib records and the Member Merge Project', 'May 8, 2019 :: Small errors with big consequences', 'April 10, 2019 :: An overview of OCLC training resources', 'March 13, 2019 :: Intro to the Virtual International Authority File (VIAF)', 'February 13, 2019 :: Provider neutral cataloging', and 'January 9, 2019 :: When to input a new record'. A 'Table of contents' sidebar is visible on the right side of the page.

OCLC

English

Release Notes System Status Dashboard Contact OCLC Support

How can we help you?

Home » WorldCat » Metadata Quality » AskQC

Previous AskQC office hours

Last updated: Mar 2, 2020

Find past AskQC office hour recordings and supporting materials.

January 2020 :: Best practices for editing WorldCat bibliographic records

- [WebEx recording - January 7](#)
- [Presentation slides](#)
- [Summary and member questions](#)

November 13, 2019 :: Comparisons of searching in Connexion and Record Manager

- [WebEx recording](#)
- [Presentation slides](#)

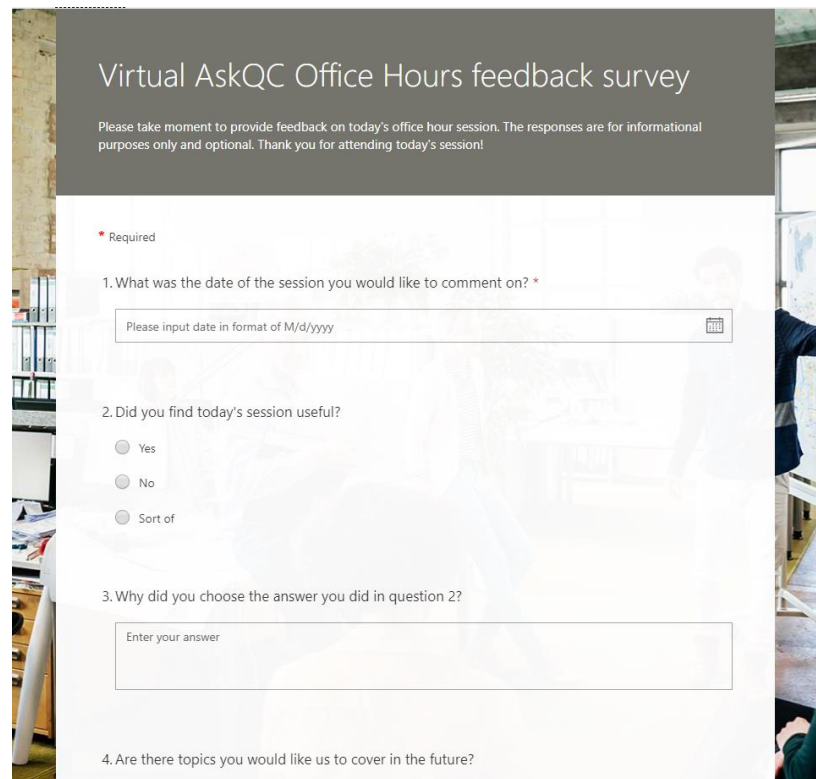
October 2019 :: 1, 2, 3, 4, 5: Everything you wanted to know about stats but were afraid to ask

– Table of contents

1. January 2020 :: Best practices for editing WorldCat bibliographic records
2. November 13, 2019 :: Comparisons of searching in Connexion and Record Manager
3. October 2019 :: 1, 2, 3, 4, 5: Everything you wanted to know about stats but were afraid to ask
4. September 11, 2019 :: WorldCat knowledge base quality: Connections between the KB and bib records
5. August 14, 2019 :: OCLC cataloging policies: An overview of Bibliographic Formats and Standards
6. June 12, 2019 :: Merging duplicate bib records and the Member Merge Project
7. May 8, 2019 :: Small errors with big consequences
8. April 10, 2019 :: An overview of OCLC training resources
9. March 13, 2019 :: Intro to the Virtual International Authority File (VIAF)
10. February 13, 2019 :: Provider neutral cataloging
11. January 9, 2019 :: When to input a new record

Housekeeping

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



Nathan Putnam

Director, Metadata Quality



Jay Weitz

Senior Consulting
Database Specialist



Bryan Baldus

Consulting
Database Specialist



Luanne Goodson

Consulting
Database Specialist



Laura Ramsey

Senior Metadata
Operations Manager



Hayley Moreno

Database Specialist II

Making valid points – WorldCat validation

Jay Weitz

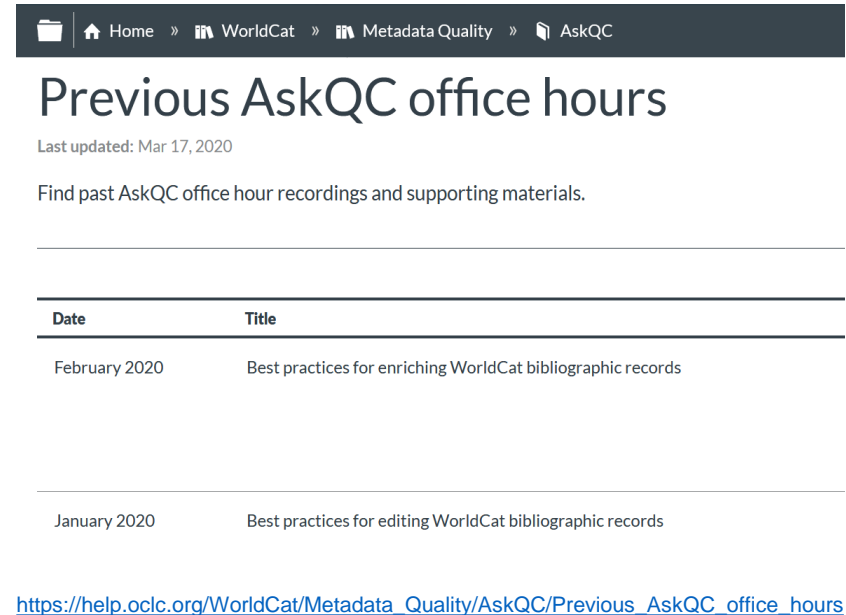
Senior Consulting Database Specialist

Bryan Baldus

Consulting Database Specialist

How the OCLC-MARC update process works

- Previously on Virtual AskQC Office Hours: “How The OCLC-MARC Update Process Works” in November 2018.
- Traced history of updating MARC 21 and its implementation as OCLC-MARC.



The screenshot shows a web browser interface with a dark navigation bar containing icons for Home, WorldCat, Metadata Quality, and AskQC. The main heading is 'Previous AskQC office hours' with a subtext 'Last updated: Mar 17, 2020'. Below this is a paragraph: 'Find past AskQC office hour recordings and supporting materials.' A table follows with two columns: 'Date' and 'Title'. The table contains two entries: one for February 2020 about enriching WorldCat records, and one for January 2020 about editing WorldCat records. At the bottom is a blue hyperlink to the page.

Date	Title
February 2020	Best practices for enriching WorldCat bibliographic records
January 2020	Best practices for editing WorldCat bibliographic records

https://help.oclc.org/WorldCat/Metadata_Quality/AskQC/Previous_AskQC_office_hours

WorldCat Validation

- Rules invoked to examine data for structure, consistency, and compliance with predetermined principles.
- Manual and automatic validation may differ depending upon your interface, your action on the record, your settings.
- Connexion browser, Connexion client, Record Manager all use same validation tables.



Image: [CTA Validating Machine. Gift of Donald A. Bruno. National Museum of American History, Smithsonian Open Access. CC0.](#)

MARC codes and conventions

MARC “defines the codes and conventions ... that identify the data elements” in MARC records

- Tags
- Indicators
- Codes
- Repeatability
- Syntax

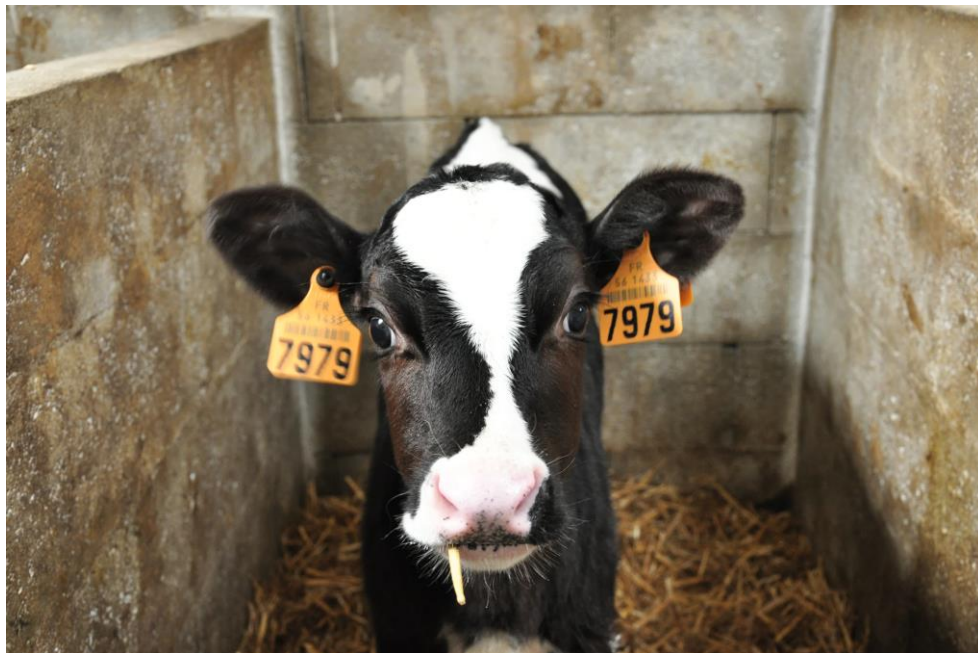


Image by [Sebastien](#) on [Unsplash](#)

Enforcement of MARC21

- Enforcement of MARC 21 formatting, coding, relationships
- Invalid fields
- Invalid subfields
- Missing required elements
- Repetition of nonrepeatable elements
- Typos in codes
- Incorrect formatting of data



Image by [Adam Griffith](#) on [Unsplash](#)

The explicit and the implicit

WorldCat Validation enforces what is explicit in MARC.

WorldCat Validation enforces what is implicit in MARC.

100 - Main Entry - Personal Name (*NR*)
110 - Main Entry - Corporate Name (*NR*)
111 - Main Entry - Meeting Name (*NR*)
130 - Main Entry - Uniform Title (*NR*)

There will be no 100, 110, or 111 field in records with field 130.

Intricate interrelationships

WorldCat Validation may generate:

- Multiple messages from a single error that results in multiple discrepancies
- Reciprocal messages that regard a single error from different points of view
- Messages about multiple occurrences of the same error in different places



Image: [Sidewall. Gift of Birge Co., Inc. Cooper Hewitt, Smithsonian Design Museum. Smithsonian Open Access. CC0.](#)

An example: bibliographic field 130

Validation can check:

- Mutual exclusivity with other 1XXs
- Mutual exclusivity with 240
- Presence of Mandatory subfield \$a
- If subfield \$2 is present, its MARC code must be valid

Validation cannot check:

- Spelling
- Correct use of field or subfields



Image by [Adrià Tormo](#) on [Unsplash](#)

More Than Simply Validation

“Replace” transaction causes the system to examine:

- Disposition of bibliographic record
 - Most notably, “pcc” in field 042
- All changes made to master record
- Authorization used to perform transaction, determined by
 - Connexion authorization level
 - Record Manager account role
- Record validation

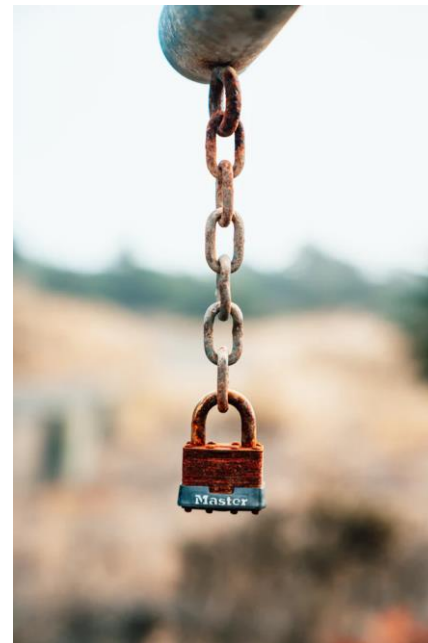


Image by [Meritt Thomas](#) on [Unsplash](#)

MARC code lists

- Source Codes for Vocabularies, Rules, and Schemes
 - <https://www.loc.gov/standards/sourcelist/index.html>
- Value Lists for Codes and Controlled Vocabularies
 - <https://www.loc.gov/standards/va-luelist/>

The Library of Congress » Librarians, Archivists » Standards

Source Codes for Vocabularies, Rules, and Schemes

LIBRARY OF CONGRESS, NETWORK DEVELOPMENT & MARC STANDARDS OFFICE

[Home](#) » [Source Codes for Vocabularies, Rules, and Schemes](#)

General Information

Introduction
Source Code Lists
Arrangement of each Source Code List
Source Code Use
Structure of the Source Codes
Source Code Maintenance

Introduction

Source Codes contains value lists of controlled vocabularies of terms (e.g., subject terms), codes (e.g., language codes), identifiers (e.g., standard identifiers), or for specific data formulation rules (e.g., RDA) or schemes (e.g., DDC). The vocabularies, rules, and schemes are generally referred to as the **source** of the value data, and the source is identified in data formats in order to support interpretation of data values that come from these sources. The Source Codes are presented as separate lists for different types of sources, for example, subject sources, classification sources, date scheme sources.

Source Code Lists

Abbreviated Title Source Codes
Access Restriction Term Source Codes
Availability Status Code Source Codes
Caption Abbreviation Source Code
Cartographic Data Source Codes
Citation Scheme Source Codes
Classification Scheme Source Codes
Content Advice Classification Source Codes
Copyright and Legal Deposit Number Source Codes
Country Code and Term Source Codes

Subject heading super list

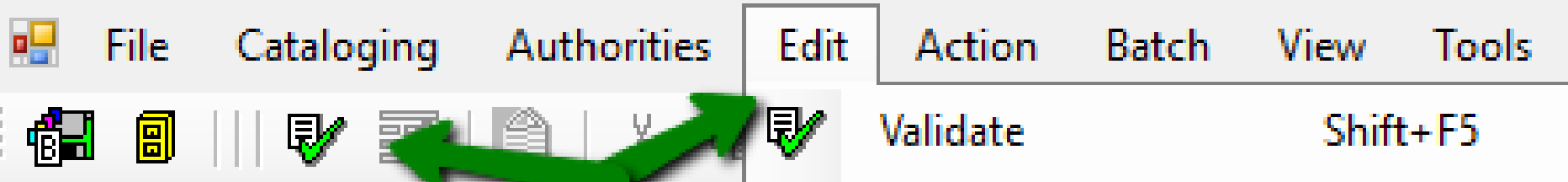
Subject Heading and Term Source Codes

- Classification Scheme Source Codes
- Curriculum Objective Code and Term Source Codes
- Function Term Source Code
- Genre/Form Code and Term Source Codes
- Name and Title Authority Source Codes
- Occupation Term Source Codes
- Subject Category Code Source Codes
- Target Audience Code and Term Source Codes
- Temporal Term Source Codes



Image by [Elias Castillo](#) on [Unsplash](#)

Interfaces and examples



OCLC Connexion

Cataloging Authorities Edit

Search Browse Create

WorldCat Browse Options

Record 1 of 1

Edit

- Editing Bibliographic Record
- Editing Bibliographic Record
- Apply CD By Name
- Apply CD From List
- Cancel Changes
- Check URL Status
- Classify
- Control All Headings
- Derive New Constant Data Record
- Derive New Master Record
- Display Record
- Enter Diacritics
- Reformat Record
- Unedit Record
- Validate Record**

Records and Reports [OCLC - OCLC X] OCLC Connexion OCLC WorldShare

https://127950.share.worldcat.org/wms/cmnc

WorldShare

Metadata Acquisitions Circulation Analytics Admin

Record Manager

Search

Data Type: Bibliographic Records

Scope: All WorldCat

Index: Keyword

Term(s): 3

Search Clear Advanced Search Close All Tabs

Search: Keyword = 3 (All WorldCat)

Edit 19629308

Print Edit Record Advanced Action

WorldCat Holding Derive Bibliographic Record Bibliographic Constant Data LHR Change Display to Text View Change Material Type Control All Headings Reformat **Validate** Send to Compare... Send Record Change Request... View in WorldCat Discovery

Other Records linked to Bibliographic Record

Clear Selections

LDR 001 005 008

LDR	caa Mi
001	1141861115
005	20200227182328.3
008	18052320182016xxx obIII 001 0 e
006	m o d
007	c #b r #d m #e u #h u #i u #j u #k u #l
040	AU@ #b eng #c AU@ #e rda #d OCLC
020	9781526135063 #q eBook
020	152613506X
020	9781526104748 #q ePUB
020	1526104741
020	#z 9781526104717 #q hardback
020	#z 9781526104724 #q paperback
024	7 10.7765/9781526135063 #2 doi
050	4 UG447
072	7 JPS #2 bicssc
072	7 POL011000 #2 bisach
072	7 JPSD #2 thema
049	OCLC
100	1 Bentley, Michelle, #e author.
245	1 0 Syria and the chemical weapons taboo
263	201807
264	1 Manchester, UK : #b Manchester University Press, #c 2018.
264	4 #c ©2016.
300	1 online resource (192 pages) : #b digital, PDF file(s).
336	text #b txt #2 rdacontent
337	computer #b c #2 rdamedia
338	online resource #b cr #2 rdacarrier
490	1 New Approaches to Conflict Analysis
490	1 Manchester Security, Conflict & Peace
500	Originally published: 2016.
504	Includes bibliographical references and index.
505	0 Introduction -- 1. The chemical weapons taboo -- Part I: A strategic taboo -- 2. Setting the redline -- 3. Ghouta and ideological innovation -- 4. Obama's taboo -- Part II: A failed taboo -- 5. Chemical weapons and false hierarchies -- 6. Escalating the crisis -- Conclusion -- Index.
520	3 This book analyses the Syria crisis and the role of chemical weapons in relation to US foreign policy. The Syrian government's use of such weapons and their subsequent elimination has dominated the US response to the conflict, where these are viewed as particularly horrific arms - a repulsion known as the chemical taboo. On the surface, this would seem to be an appropriate reaction: these are nasty weapons and eradicating them would ostensibly comprise a "good" move. But this book reveals two new aspects of the taboo that challenge this prevailing view. First, actors use the taboo strategically to advance their own self-interested policy objectives. Second, that applying the taboo to Syria has actually exacerbated the crisis. As such, the book challenges the prevailing view of the chemical weapons taboo as a moral imperative.

Validation Results

BLvl (Leader/07) - invalid relationship - when element is equal to a, then 773 must be present
 Cont (008/24-27) - invalid code
 020 occurrence 1 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 020 occurrence 2 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 020 occurrence 3 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 020 occurrence 4 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 020 occurrence 5 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 020 occurrence 6 - invalid relationship - when element is present, then BLvl (Leader/07) must equal c, i or m
 072 occurrence 2, \$2 occurrence 1 - invalid code
 650 occurrence 6, \$2 occurrence 1 - invalid code
 650 occurrence 7, \$2 occurrence 1 - invalid code
 650 occurrence 8, \$2 occurrence 1 - invalid code
 655 occurrence 1 - invalid relationship - when element is present, then 655 \$a must be present
 655 occurrence 1, indicator 1 - invalid relationship - when element is equal to blank, then 655 \$b must not be present
 776 occurrence 1, \$i - invalid relationship - when element is present, then 776 indicator 1 must equal 0

Close Print

OCLC WorldShare X +

https://127950.share.worldcat.org/wms/crmq/metadata/cataloging/edit/bib/1141861115

Circulation Analytics Admin

Edit 1141861115 1 of 1

Print Edit Record Advanced Action Save

Unable to validate record.
Found 15 validation errors. See details below.

▼ Bibliographic Record

Clear Selections

LDR	caaa Mi	Invalid relationship - when Bibliographic Level (Leader/07) is equal to a, then 773 must be present.
001	1141861115	
005	20200227182328.3	
008	18052320182016xxx obIII 001 0 eng	Invalid code in Nature of Contents Code (00024-27)
006	m o d	
007	c #b r #d m #e u #h u #i u #j u #k u #l	
040	AU@ #b eng #c AU@ #e rda #d OCLC	
020	9781526135063 #q eBook	Invalid relationship - when 020 is present, then Bibliographic Level (Leader/07) must equal c, i or m.
020	152613506X	Invalid relationship - when 020 is present, then Bibliographic Level (Leader/07) must equal c, i or m.
020	9781526104748 #q ePUB	Invalid relationship - when 020 is present, then Bibliographic Level (Leader/07) must equal c, i or m.
020	1526104741	Invalid relationship - when 020 is present, then Bibliographic Level (Leader/07) must equal c, i or m.
020	#z 9781526104717 #q hardback	

File Cataloging Authorities Edit Action Batch View Tools Window Help OCLC Merge

Icons: [Clipboard] [List] [Checkmark] [Print] [Save] [Cut] [Copy] [Paste] [Find] [Home] [End] [Refresh] [Help] [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [List] [Menu] [Close]

OCLC 1098794605 No holdings in TS233 - 1262 other holdings

LDR	cam i
001	1098794605
005	20200207134
008	190621s2020
010	2019024907
040	DLC #b eng #
020	97819848064
020	1984806432
020	#z 978198480
042	pcc
050	0 0 PS3561.R44 #
082	0 0 813/.54 #2 23

OCLC Connexion - [Online WorldCat: The vanishing]

File Cataloging Authorities Edit Action Batch View Tools Window Help OCLC Merge

Icons: [Clipboard] [List] [Checkmark] [Print] [Save] [Cut] [Copy] [Paste] [Find] [Home] [End] [Refresh] [Help] [1] [2] [3] [4] [5] [6] [7] [8] [9] [10] [List] [Menu] [Close]

OCLC 1098794605 No holdings in TS233 - 1262 other holdings

LDR	cam i
001	1098794605
005	20200207134137.8
008	190621s2020 nyu 000 1 eng
010	2019024907
040	DLC #b eng #e rda #c DLC #d MJ8 #d OCLCF #d CMI #d UAP #d OI6 #d TCH #d ZGR #d T3Q #d TXSCH #d NZAUC #d DLC #d YDX
020	9781984806437 #q (hardcover)
020	1984806432
020	#z 9781984806451 #q (ebook)
050	0 0 PS3561.R44 #b V36 2020
082	0 0 813/.54 #2 23
049	MAIN
100	1 Krentz, Laura Ann. The vanishing

OCLC Connexion X

Not authorized to delete \$a in 042.

Invalid relationship examples

264 4 2017

Validation Results

264 occurrence 2, indicator 2 - invalid relationship - when element is equal to 4, then 264 \$c must be present

264 occurrence 2, indicator 2 - invalid relationship - when element is equal to 4, then 264 \$a must not be present

264 occurrence 2, \$a - invalid relationship - when element is present, then 264 indicator 2 must not be equal to 4

Close Print

008		181003s2018	ne a	000 0	eng d
040		OCLCQ	‡b eng ‡e rda ‡c OCLCQ		
020		9789462622227	‡q (paperback)		
020		9462622221	‡q (paperback)		
050	4	NB1278	‡b .T84913 2018		
082	0 0	730	‡2 23		

Validation Results

082 occurrence 1, indicator 2 - invalid relationship - when element is equal to 0, then 010 must be present

Invalid code examples

008		200401t20182016xxk	bIII 001 0 eng
▶	040		OCLCQ †b eng †e rda †c OCLCQ
▶	072	7	JPS †2 bicssc
▶	072	7	POL011000 †2 bisach
▶	072	7	JPSD †2 thema
	049		OCLC
▶	100	1	Bentley, Michelle. †e author.
▶	245	1 0	Syria and the chemical weapons taboo : †b exploiting the forbidden / †c Michelle Bentley.
▶	264	1	Manchester, UK : †b Manchester University Press, †c 2018.
▶	336		text †b txt †2 rdacontent
▶	337		unmediated †b n †2 rdamedia
▶	338		volume †b nc †2 rdacarrier
▶	650	7	International relations. †2 bicssc
▶	650	7	Politics and government / International relations. †2 bicssc
▶	650	7	POLITICAL SCIENCE †x International Relations †x General. †2 bisach
▶	650	7	POLITICAL SCIENCE †x Security (National & International) †2 bisach
▶	650	7	POLITICAL SCIENCE †x International Relations †x Arms Control. †2 bisach
▶	650	7	Diplomacy. †2 thema

Validation Results

Cont (008/24-27) - invalid code
072 occurrence 2, \$2 occurrence 1 - invalid code
650 occurrence 3, \$2 occurrence 1 - invalid code
650 occurrence 4, \$2 occurrence 1 - invalid code
650 occurrence 5, \$2 occurrence 1 - invalid code

Close Print

Invalid data format examples

Online WorldCat: School-based interventions to reduce dating and sexual violence [electronic resource]

OCLC 897086602 No holdings in OCLCQ - 1 other holding
No OCLCQ holdings in GLIMIR cluster; 1 other holding in GLIMIR cluster of 1

LDR		cam Mi
001		897086602
005		20171211201911.0
008		141201s2014 xx 000 0 eng
010		201501010101
040		OCLCQ #b eng #e rda #c OCLCQ #d OCLCQ
245	0 0	School-based interventions to reduce dating and sexual violence [electronic resource] : #b a systematic review / #c Lisa De La Rue [and others].
336		text #b txt #2 rdacontent
337		unmediated #b n #2 rdamedia
338		volume #b nc #2 rdacarrier
856	4 0	#u www.campbellcollaboration.org/lib/project/268

Validation Results

```
010 occurrence 1, $a occurrence 1 - incorrect data format
856 occurrence 1, $u occurrence 1 - incorrect data format
```

Close Print

Other items of note

- Authority record validation
 - Separate rules for LC/NACO Authority File vs. other authority files
 - For NACO contributors: Precomposed diacritics are not allowed
 - é (U+0065+U+0301) is allowed while é (U+00E9) is not
- Unable to setting holdings?
 - Check for validation errors

What questions do you have?



Nathan Putnam

Director, Metadata Quality



Jay Weitz

Senior Consulting
Database Specialist



Bryan Baldus

Consulting
Database Specialist



Luanne Goodson

Consulting
Database Specialist



Laura Ramsey

Senior Metadata
Operations Manager



Hayley Moreno

Database Specialist II

Thank you!

May Virtual AskQC Office Hours

The mysterious 3xx fields

Thursday, May 7 at 9:00 AM Eastern

Thursday, May 14 at 4:00 PM Eastern

Registration available at oclc.org/askqc

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

Session links available at
oclc.org/askqc