Training Webinar for New BIBCO Members

Course Summary

• This course is designed to provide new BIBCO institutions with an overview of the program. The course will also prepare catalogers to contribute BIBCO Standard Records (BSR) using the PCC RDA BSR guideline.
Learning Objectives

At the end of the course, participants will be able to:

• Learn of membership benefits
• Understand BIBCO parameters
• Identify the BIBCO documentations
• Identify the characteristics of the BIBCO Standard Record (BSR)
• Understand policy and practices of creating new BSR and modifying existing non-BIBCO and BIBCO records
• Apply PCC RDA BSR MAP to provide required elements in BSR records
• Learn about record review process

Agenda

• Overview of the BIBCO Program
• PCC Membership Benefits
• BIBCO Program Parameters
• Documentations
• Reporting Statistics
• Characteristics of BSRs
• Workflow: Creating New BSR and Modifying Existing BIBCO and non-BIBCO records
• BIBCO Review
• ECIP Cataloging Partnership Program
Overview of BIBCO

- BIBCO – Monographic Bibliographic Record Program
- Governed by representatives of the member libraries
- No centralized database among participating utilities to redistribute bibliographic records automatically
- Participants contribute new or edit existing bibliographic records using shared databases (e.g., OCLC, SkyRiver, etc.)
- No centralized database among participating utilities to redistribute bibliographic records automatically
- The PCC encourages BIBCO participants and utilities to maximize availability of BIBCO records

PCC Membership Benefits

- Participating in programs that are shaping the future of cataloging practice
- Reducing the cost of cataloging operations
- Increasing the number of cataloging records that can be used with little editing
- Receiving training by experienced PCC trainers
BIBCO Program Parameters: Membership Requirements

- Proficiency in creating bibliographic records for monographic and integrating resources using Resource Description Access (RDA) as description standard, and applying accepted cataloging standards for subject analysis and classification of monographic materials
- Achieve and Maintain independence for contributing authority records in NACO
- Acquire OCLC Enhance National (ENN) authorization or appropriate authorization from other utilities

BIBCO Program Parameters: Membership Requirements

- Undergo “Training Webinar for New BIBCO Members”
- Undergo review of records to reach independence
- Local BIBCO liaison coordinates local program activities, ensures quality contribution, and communicates with PCC BIBCO Coordinator and other BIBCO contacts
BIBCO Program Parameters:

PCC Governance

- Directors of BIBCO institutions vote annually for BIBCO representatives to the PCC Policy Committee
- Those in policy level positions are eligible for nomination to serve as BIBCO representative to the PCC Policy Committee
- BIBCO Contacts may attend the annual PCC Operations Committee
- Members from BIBCO libraries may serve on committee and task groups, become trainers or reviewers

BIBCO Program Parameters:

BSR Contribution Requirements

- Contribute a minimum of 100 bibliographic records annually
- Designate BIBCO records with MARC field “042 pcc” and “Leader/17 Encoding level = #” (“8” for ECIP records)
- Support controlled access points with authority records
- Assign at least one or two subject headings or Genre/form terms from an established thesaurus
- Assign a classification number from an established classification system
- Follow instructions in PCC Series Policy Task Group Report for series treatment
BIBCO Program Parameters: General Documentations

- BIBCO Participants’ Manual found on the PCC homepage
- RDA, in conjunction with LC/PCC Policy Statements
- PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile
- PCC Provider-Neutral Guidelines
- Integrating Resources Manual (May 2014 version)
- Post RDA Implementation Guidelines and Standards
- Descriptive Cataloging Manual Z1 (DCM Z1)
- SHM: Subject Headings Manual, or other established thesauri or subject heading systems
- CSM: Classification and Shelflisting Manual

PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile

April 15, 2014 revision
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**BIBCO Program Parameters: General Documentations**

- MARC 21 Format for Bibliographic Data
- ALA-LC Romanization tables
- PCC Guidelines for Creating Bibliographic Records in Multiple Character sets
- PCC web site

*Note: These documents appear in various locations in the PCC, Cataloger’s Desktop, and other web sites*

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**Guidelines for Reporting Statistics**

- Program members track their record contributions internally
- One reporter from a BIBCO institution completes a survey
- Category: original BIBCO Standard Record and any modification of an existing non-BIBCO record to make it a BSR
- BIBCO ECIP Cataloging Partnership member should include ECIP records in the count

*Note: BIBCO libraries may upgrade own institution’s previously coded non-BIBCO records to BSR*
**Guidelines for Reporting Statistics**

- Statistics gathered for BIBCO twice a year – early April and early October
- PCC Secretariat send SurveyMonkey link for members to report data
- [Statistical report](#) on the PCC web site
- Questions, contact [bibcomail@loc.gov](mailto:bibcomail@loc.gov) or [coop@loc.gov](mailto:coop@loc.gov) using the appropriate subject line

**PCC BIBCO Standard Records (BSR)**

- Definition of the BSR
- Background of the BSR
- Characteristics of the BSR
- Processing and distribution
- Creating BSRs
- Updating existing records (non-BIBCO, BIBCO)
Definition of the BSR

- The BSR is a bibliographic record for a monographic or integrating resource that has been authenticated by a participant in the BIBCO Program.

What Does “Authenticate” Mean?

- Non-BIBCO record

  Leader/17 Encoding level = (may be any value)
  Leader/18 Descriptive cataloging form = “a”, “i” or others
  008/39 Cataloging source = d
  040 Cataloging source/Language of catalog $a BP1 $b eng $e rda $c BP1

- Authenticated by BIBCO library - UCSD

  Leader/17 Encoding level = #
  Leader/18 Descriptive cataloging form = “i”
  008/39 Cataloging source = c
  040 Cataloging source/Language of catalog $a BP1 $b eng $e rda $c BP1 $d CUS
  042 Authentication code $a pcc
Background of the BSR

• Single-encoding level BIBCO Standard Record (BSR) implemented in 2010.
• **PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile** under RDA was added in 2012.

Characteristics of the BSR

• BSR is a “Floor” description that emphasizes access point over extensive descriptive data
• Inclusion of essential data that supports user tasks to find, identify, select, and obtain needed resources
• Additional elements may be added if determined to be important for identification or access
• Entities for names, subject, and/or series must be supported by authority records established through NACO and SACO
• Using defined element set in the BSR
• BSR content is supported through use of MARC21 Format for Bibliographic Data
Characteristics of the BSR

- The BSR element set includes:
  - Elements labeled “core” and “core if” that are required in RDA
  - Elements labeled “PCC core” that are defined by PCC as additional elements

- PCC RDA BSR Metadata Application Profiles
  - guide for BIBCO-coded records

Processing and Distribution

- Contributing BIBCO records via participating utilities
- Contributing BIBCO records via batchloading
- BIBCO ECIP partners send ECIP records via ECIP program software
- No centralized database among participating utilities
Utility Input Guidelines

- Follow bibliographic input standards of utilities (OCLC, SkyRiver, etc.) in addition to meeting PCC standards
- OCLC:
  - Bibliographic Formats and Standards
  - Guidelines for National Level Enhance participants
- SkyRiver: to be developed.

When to Create BSRs

- BIBCO libraries decide what and when to catalog a record as a BIBCO record
- Search home institution’s utility to avoid duplication
- When local needs dictate a practice not supported by BIBCO documentation, BIBCO library may choose between 2 options:
  - Contribute a non-BIBCO record
  - Modify the content of the record for its local use only
Creating New BSRs

- Policy and Practices
  - PCC Policy Committee (PoCo)’s latest decision on the deadline of December 31, 2014 being the last day BIBCO members can contribute BSR using AACR2
  - PCC RDA BSR Metadata Application Profiles
    - guide for BIBCO-coded records

Authority Control in BSRs

- Definition of Authority Control:
  The practice of creating and maintaining index terms for bibliographic material
- The BSR emphasizes access points that all authorized access points in the BSR should be under authority control
Authority Control Programs: NACO and SACO

- NACO is a prerequisite to BIBCO membership
- Authority control applies to subject and classification elements, although SACO membership is not a BIBCO prerequisite

Authority Control Program: NACO

- [Post RDA Implementation Guidelines and Standards](#)
- Personal, corporate, conference names, family names, place names, and fictitious characters
- Preferred titles/Conventional Collective Titles
- Series tracing
- DCM Z1
- Reporting BFM on LC bibliographic records
- [PCC Guidelines on Using Relationship Designators in NACO Authority Records](#)
Authority Control Program: SACO

- Subject, Genre, and/or Form Headings
- No requirement to use one particular subject thesaurus, genre/form thesaurus or classification scheme
- Newly-proposed subject headings through SACO may be entered in bibliographic records coded “pcc”
- Assign at least one or two headings to represent the primary subject and/or form of the work

Authority Control: LCSH

- Apply Subject Headings Manual (SHM) instructions sheets
- H 170 “CONSER and BIBCO Standard Records”
- H 180 “Assigning and Constructing Subject Headings”
- H 181 Arabic and Persian subject headings
- H 182 Chinese, Japanese, and Korean subject headings
- Establish new headings for discrete topics and named entities as needed through SACO
Authority Control: Classification

- Not required to LC classification
- Only a classification number is required, supplying a full call number is an option
- If a classification number from another scheme appears in a record, retain the number during the upgrade for a BSR

Authority Control: Library of Congress Classification (LCC)

- Propose new LC Classification numbers if appropriate on topics not yet represented in the classification system by following the LC Classification and Shelflisting Manual (CSM), F 50
- BIBCO libraries are encouraged, but not required, to submit a literary author number that has not yet been established to LC by following the instruction on establishing literary author numbers
Authority Control:
Library of Congress Classification (LCC)

• Be aware obsolete number in the LC shelflist
• Input convention:
  • 050 Library of Congress call number
    ➢ 1st indicator “blank” (no information provided)
    ➢ 2nd indicator “4” (assigned by agency other than LC)
    ➢ $a$ (required for BSR as the “classification number”)
    ➢ $b$ (optional as the “item number” or “book number”)

• 082 #4 Dewey Decimal Classification

BSRs: Relationship Designators in Bibliographic Records

• PCC catalogers use relationship designators in the RDA appendices
• PCC Policy for addition of relationship designators
  • Include a relationship designator for all creators
  • PCC relationship designator proposal form
BSRs: Non-Latin Materials

- **PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets**
- **Non-Latin Script Data in Name Authority Records**
  - Authorized access points must be in romanized form
  - PCC allows the option of the addition of references with non-Latin characters to NARs in the LCNAF

BSRs: Special Formats

- **PCC RDA BIBCO Standard Record (BSR) Metadata Application Profile**
  - A combination of RDA “Core,” RDA “Core if,” “PCC Core,” and “PCC Recommended” elements applicable to archival materials, audio recordings, cartographic resources, electronic resources (if cataloged in the computer file format), graphic materials, moving images, notated music, rare materials, and textual monographs
  - Includes elements required for a BSR for material in a special format
BSRs: Electronic Resources

• Manuals serve both BIBCO and CONSER catalogers
  
  ➢ PCC Provider-Neutral Guidelines
  ➢ Integrating Resources Manual (revised RDA version to be available in May 2014)
BIBCO Textual Monograph Record

Adaptation of Records From Another Utility

- Follow the MARC coding conventions

Non-BIBCO record from Michigan State University, a SkyRiver utility member, adapted by University of California, San Diego:

- 040 $a original library’s MARC code
  $c contributing library’s symbol

040 MiEM #b eng #e rda #c CUS
Updating an Existing Non-BIBCO Records

- Consult the utility’s documentation and meet input standards of the utility when converting an existing record and authenticating it as a BIBCO record

  040 $a original library’s symbol
  $c original library’s symbol
  $d contributing library’s symbol

Updating an Existing Non-BIBCO Records: Use of 042 Field

- Add pcc to any existing code to show the history of the record
- Subfield $a of 042 is repeatable
  042 $a lcode $a pcc
  042 $a lccopycat $a pcc
Modifying an Existing BSR

- Individuals with NACO authorizations are now able to edit and replace BIBCO records
- Creation of new BIBCO records and authentication of existing non-BIBCO records (i.e., adding 042 code “pcc”) will continue to be restricted to BIBCO members

Upgrading Records Created by A National Library

- When modifying a BSR created or updated by a national library or national bibliographic agency, leave 008/39 Cataloging Source “blank”
Record Maintenance

• To correct errors
  ➢ Correct typographical errors and errors in content designation whenever they are encountered
  ➢ Make sure to compare the information in the record to the piece(s) in hand

Record Maintenance

• To reflect changes in the publication
  ➢ Integrating resources: Modify the record as needed when using an existing BSR for an integrating resource (print or electronic) to ensure the accuracy of the description
  ➢ Multipart monographs: Modify the existing record(s) to reflect the changes undergone over the course of the publication cycle
Record Maintenance

• To reflect changes to policies and practices used within BIBCO for bibliographic control
  ➢ In general, an authenticated record should not be updated merely to reflect changes in cataloging codes or BIBCO practice, except:
    ➢ Pre-AACR2 record
    ➢ Change to subject headings
    ➢ Changes to classification or content analysis

Record Maintenance

• To reflect changes to authorized forms of access points
  ➢ Make needed correction to a name authority record that has changed since a BIBCO record was contributed
  ➢ Report BFM following NACO guideline if the change in the authorized access point involves a Library of Congress bibliographic record
BIBCO Record Review

• Responsibilities of the PCC Secretariat:
  ➢ Coordinate with the institution and its reviewer to arrange the record review process
  ➢ Select reviewer that fits the institution’s need, e.g., special format or subject area
  ➢ Assist with communications as needed during the review
  ➢ Send out independence letter to the library upon the recommendation of the reviewer that the reviewing institution has successfully completed the review process

• Responsibilities of the institution under review:
  ➢ Create BSR records in a timely manner after training
  ➢ Review records locally if necessary before submitting for official review
  ➢ Submit records in reasonable quantities to the reviewer each time, designate the OCLC symbol of the reviewer’s institution
  ➢ Revise records according to reviewer’s comments before sending new ones
  ➢ Have each cataloger send approximately 20 records
  ➢ Build reviewing skills locally for sustained participation in the BIBCO program
BIBCO Record Review

• Responsibilities of the BIBCO reviewer:
  ➢ Provided feedback within a week, if possible, to maintain local workflow and timely contribution of records to the shared database
  ➢ Respond to library’s questions promptly
  ➢ Let the institution know if any interruptions from keeping the review going
  ➢ Track progress of the institution under review
  ➢ Consult with the library and the PCC Secretariat if additional questions arise
  ➢ Report the independent status of the library to the PCC Secretariat

BIBCO Record Review

• Evaluation criteria for independence:
  ➢ The MARC 21 format is properly coded
  ➢ All mandatory fixed and variable fields are present
  ➢ All access points are represented in the appropriate authority files
  ➢ Descriptive cataloging follows PCC policy and documentation
  ➢ A standard classification number is present for formats which require one
  ➢ Enhancements to existing records meet input standards of the utility
  ➢ The institution has produced 80-100 records or a quantity sufficient to assure consistent high quality
ECIP Opportunity for BIBCO Institutions

- Library of Congress ECIP Cataloging Partnership Program creates pre-publication records
- BIBCO ECIP partners serve as virtual cataloging teams for forthcoming titles from publishers
- LC distributes the completed ECIP records as PCC BIBCO records to OCLC
- BIBCO membership is a pre-requisite to join ECIP partner program
- Contact ECIP office

Questions or Comments on BIBCO-related questions

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