

Orientation Webinar for New BIBCO Members

Last revised: February 29, 2024

Agenda

- Overview of the BIBCO Program
- Membership/Contribution Requirements
- Documentation
- BIBCO Records
- Record Review
- Reporting Statistics
- PCC Governance and Activities

Overview of BIBCO Program

- One of four components of the Program for Cooperative Cataloging (PCC)
- BIBCO Monographic <u>Bib</u>liographic Record <u>Co</u>operative Program
- Participants contribute new and updated bibliographic records to shared databases following BIBCO program standards
- No centralized record distribution system

Membership Requirements

- Proficiency in creating bibliographic records for monographic resources using:
 - RDA as description standard
 - Accepted cataloging standards for subject analysis and classification
- Achieve and maintain independence for contributing authority records in NACO
- Acquire OCLC Enhance National (ENN)
 authorization (or appropriate authorization from
 other utilities)

Membership Requirements

- Attend orientation webinar
- Undergo review of BIBCO records to reach independence
- Name a BIBCO contact
 - coordinates local institution's participation
 - ensures quality of contributions
 - tracks and reports BIBCO statistics
 - monitors BIBCO discussion list
 - communicates with LC staff (and/or Funnel Coordinator if a funnel member) as needed

Contribution Requirements

- BIBCO members contribute a minimum of 100 BIBCO records per year (unless a funnel member)
- Designate records with:
 - Leader/17 (encoding level) = blank
 - Field 042 (authentication code) = pcc
- Support controlled access points with authority records
- Assign at least 1-2 subject headings or genre/form terms from an established thesaurus
- Assign a classification number from an established system (if required – varies by format of material)

Documentation

- General cataloging
- BIBCO-specific

General Cataloging Documentation

- RDA (original.rdatoolkit.org NOT access.rdatoolkit.org)
- LC/PCC Policy Statements
- MARC 21 Format for Bibliographic Data
- ALA-LC Romanization Tables
- LC Descriptive Cataloging Manual Z1 (DCM Z1)
- <u>LC Subject Headings Manual</u> (SHM), or other manuals for established thesauri or subject heading systems
- <u>LC Classification and Shelflisting Manual</u> (CSM), or other manuals for established classification systems

BIBCO-Specific Documentation

- BIBCO Standard Record (BSR) RDA Metadata Application Profile (BSR)
- BIBCO Participants' Manual (BPM)
 - Appendix A: Integrating Resources Manual
- PCC Training Manual for Applying Relationship Designators in Bibliographic Records
- PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets
- Provider-Neutral E-Resource MARC Guide
- PCC Guidelines for Minimally Punctuated MARC Bibliographic Records



BIBCO Standard Record (BSR) RDA Metadata Application Profile

January 21, 2020 revision

https://www.loc.gov/aba/pcc/bibco/documents/PCC-RDA-BSR.pdf

Program for Cooperative Cataloging Washington, D.C. 2020 BIBCOmail@loc.gov

Organization of BSR

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BSR: "RDA Core and PCC Core" Section

Includes:

- Elements labeled "Core" in RDA
- Elements labeled "PCC Core" required by PCC as additional elements
- Elements labeled "PCC Recommended"



BSR: "RDA Core and PCC Core Elements" Sample Page

* General instruction; (T) Transcribed element; + PCC Core element; (R) PCC Recommended element

RDA INSTRUCTIONS & ELEMENTS	RDA NO.	NOTES	MARC ENCODING
Manufacturer's name (T) +	2.10.4	PCC Core for rare materials when present in the resource, if appropriate. Generally transcribe all manufacturers' names if appropriate (see DCRM(B,C,G,M) 4F). If a manufacturer's name is known to be fictitious or incorrect, supply a correction in square brackets. If no manufacturer's name appears in the resource, supplying the manufacturer's name or recording "[manufacturer not identified]" is not required.	264
Date of manufacture +	2.10.6	PCC Core for rare materials when present in the resource, if appropriate. Generally transcribe all dates of manufacture if appropriate (see DCRM(B,C,G,M) 4G). If a date of manufacture is known to be fictitious or incorrect, supply the correct year in square brackets. If no date of manufacture appears in the resource, supplying the date of manufacture or recording "[date of manufacture not identified]" is not required.	264
Copyright date (R)	2.11	Rare materials: PCC recommends recording the year of copyright when present in the resource. If a full transcription of the copyright statement is desired, record it in a note.	264
Title proper of series (T)	2.12.2		490
Other title information of series (T) +	2.12.4	PCC Core for rare materials.	490
Statement of responsibility relating to series (T) +	2.12.6	PCC Core for rare materials.	490
ISSN of series (T) +	2.12.8		490
Numbering within series (T)	2.12.9		490
Title proper of subseries (T)	2.12.10		490
ISSN of subseries (T) +	2.12.16	Transcribe both ISSN of series and ISSN of subseries if both are present.	490
Numbering within subseries (T)	2.12.17		490

BSR: "Required Non-RDA and MARC Data" Sample Page

Textual Monographs

(For rare and special textual monographs, see instead "Rare Materials")

ELEMENT	NOTES	MARC ENCODING
Leader		
Type of record	Use "a" or "t"	Ldr/06
Type of control	Use "a" (for collections under archival control)	Ldr/08
Bibliographic level	Use "m"	Ldr/07
Encoding level	Use 'blank' value	Ldr/17
Descriptive cataloging form	Use "i" (ISBD punctuation included) or "c" (ISBD punctuation omitted) For more information on options for omission of punctuation, see: PCC Guidelines for Minimally Punctuated MARC Bibliographic Records	Ldr/18
Variable Control Fields – Physical Description Fixed Field		
Category of material	Microform textual monographs: use "h".	007/00
Specific material designation		007/01
Variable Control Fields – Fixed-Length Data Elements		
Type of date/publication status		008/06
Date 1		008/07-10
Date 2		008/11-14
Place of publication, production, or execution		008/15-17
Form of item		008/23



BIBCO Participants' Manual

Third Edition

April 5, 2022 revision

https://www.loc.gov/aba/pcc/bibco/documents/bpm.pdf

Integrating Resources: A Cataloging Manual

Appendix A to the BIBCO Participants' Manual

and

Module 35 of the CONSER Cataloging Manual

February 11, 2015 revision

https://www.loc.gov/aba/pcc/conser/word/Module35.doc

Program for Cooperative Cataloging Washington, D.C. 2015



PCC Standing Committee on Training (SCT) Training Manual for Applying Relationship Designators in Bibliographic Records

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PCC Policy for Addition of Relationship Designators	
Statement of Policy	
Best Practices	
Examples	
General Guidelines	
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https://www.loc.gov/aba/pcc/sct/documents/rel-desig-guide-bib.pdf

PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets

[Revised for RDA, June 28, 2016; last revised: September 7, 2017]

https://www.loc.gov/aba/pcc/bibco/documents/PCCNonLatinGuidelines.pdf



Provider-Neutral E-Resource

MARC Record Guide: P-N/RDA version

January 16, 2024 revision

Program for Cooperative Cataloging

Washington, D.C.

2024

BIBCOmail@loc.gov

https://www.loc.gov/aba/pcc/scs/documents/PN-RDA-Combined.pdf

PCC Guidelines for Minimally Punctuated MARC

Bibliographic Records

Prepared by PCC Standing Committee on Applications

Approved by PCC Policy Committee,

Sept. 2019

Policy effective January 2020

BIBCO Records

- Definition
- Historical Background
- Record Characteristics
- Workflow
- When to Contribute BIBCO Records
- Authority Control
- Record Maintenance

Definition

BIBCO Record =
 A bibliographic record for a monographic resource, in any format, that has been authenticated by a participant in the BIBCO Program.

What Does "Authenticate" Mean?

- BIBCO cataloger has added "pcc" authentication code in 042 field 042 ## \$a pcc
- Code indicates the record conforms to BIBCO program standards
- Can authenticate original cataloging (new records) or copy cataloging (updates to existing non-BIBCO records)

Authenticating Existing Records

- When updating an existing non-BIBCO bibliographic record to authenticate it for BIBCO, make sure resulting record satisfies all BIBCO requirements (just as when creating new original BIBCO records)
- Add your institutional code in 040 \$d
- If record was issued by a national bibliographic agency, leave existing 008/39 (cataloging source) value as "blank"



MARC Coding Differences: Non-BIBCO vs. Current BIBCO records

	Non-BIBCO	ВІВСО
Leader/17 Encoding level	varies	blank or "8" (if CIP – temporary only)
Leader/18 Descriptive cataloging form	varies	"i" (ISBD punctuation included) or "c" (ISBD punctuation omitted)
008/39 Cataloging source	"d" or blank (if national agency)	"c" (most BIBCO participants) or blank (if national agency)
040 Cataloging source	varies	\$b eng \$e rda
042 Authentication code	N/A	\$a pcc

Historical Background

1994-2010: Two BIBCO options

• AACR2; choice of encoding levels (blank=full or 4=core)

2010: BIBCO Standard Record (BSR) Metadata Application Profile implemented

AACR2; single encoding level (full)

2013: BSR RDA MAP implemented

- RDA; single encoding level (full)
- use was optional

2015: BSR RDA MAP fully adopted

- RDA; single encoding level (full)
- use made mandatory for all newly-authenticated records

Characteristics of BIBCO Records

- BIBCO record is a "floor" description that emphasizes access points over extensive descriptive data
- Includes essential elements that support user tasks to find, identify, select, and obtain needed resources
- Additional elements may be added if determined to be important for identification or access
- Access points for names and/or series must be supported by authority records established through NACO
- Access points for subjects must be controlled and, if using LCSH, proposed though SACO when applicable

Workflow

- BIBCO catalogers contribute records via
 - direct entry in participating utilities, or
 - batchloading to participating utilities
- CIP partners contribute BIBCO CIP records via CIP program software

Utility Input Guidelines

- Follow bibliographic input standards of your chosen utility
- OCLC: <u>Bibliographic Formats and Standards</u>
- Search utility before creating a new record so don't create duplicates

When to Contribute BIBCO records

- BIBCO libraries decide which portions of their collections they will catalog as BIBCO records
- Not required to authenticate every record!
- When local needs dictate a practice not supported by PCC documentation, may:
 - Choose not to create a BIBCO record, or
 - Create a BIBCO record, then modify the content of the record in their local system using local fields

Authority Control

 Authority records must support controlled access points in BIBCO records

Authority Control: Name/Series

- NACO is a prerequisite to BIBCO membership
- Required to evaluate and upgrade to RDA any NACO records with 667 note "THIS 1XX FIELD CANNOT BE USED UNDER RDA ..." before using the access point in a BIBCO record
- Strongly encouraged to upgrade "RDA acceptable" NARs to RDA before using the access point in a BIBCO record
 - an "RDA acceptable" NAR is one that is coded AACR2, but the heading would be constructed the same under RDA and applicable LC-PCC PSs
- Series tracing is optional in BIBCO records but any traced series must be supported by a NACO series authority record

Authority Control: Subject

- Authority control applies also to subject elements
- Assign at least one or two headings to represent the primary subject, genre, and/or form of the work
- Not required to use Library of Congress Subject Headings (LCSH)
- May use any subject vocabulary assigned a code in <u>MARC 21 Subject Heading and Term Source Codes</u>
- If subject headings from other vocabularies already appear in a record, retain them

Authority Control: If LCSH ...

- Apply <u>LC Subject Headings Manual</u> (SHM) instruction sheets:
 - H 170 CONSER and BIBCO Standard Records
 - H 180 Assigning and Constructing Subject Headings
 - Other sheets as applicable

Authority Control: Classification

- Classification number is required for:
 - textual monographs, cartographic materials, printed music, and electronic resources
- Supplying a full call number is an option
- Not required to use Library of Congress Classification (LCC)
- If classification numbers from other schemes already appear in a record, <u>retain</u> them
 - 082 Dewey Decimal Classification
 - 086 SuDoc Classification

Authority Control: If LCC ...

- Apply LC <u>Classification and Shelflisting Manual</u> (CSM)
- Be aware of obsolete numbers in the LC shelflist
- Input convention for BIBCO members:
- 050 Library of Congress call number
 - 1st indicator "blank" (no information provided)
 - 2nd indicator "4" (assigned by agency other than LC)
 - \$a (required "classification number")
 - \$b (optional "item number" or "book number")

050 4 classification number (required) +b book number (optional)

Authority Control Program: SACO

- SACO membership is not a BIBCO prerequisite
- If using LCSH, can propose new headings as needed through <u>SACO</u> if would like to join
- Subject headings proposed through SACO are considered pre-approved and may be entered in records coded "pcc"
- If a subject proposal is subsequently rejected by LC, remove the heading from the BIBCO record or modify it as needed

Authority Control Program: SACO

- If using LCC, can 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) <u>F 50</u>
- Propose new LC literary author numbers if appropriate by following CSM <u>F 632</u>.

Relationship Designators in BIBCO Records

- PCC policy: Include a relationship designator for all creators
 - Consult: "PCC Training Manual for Applying Relationship Designators in Bibliographic Records"
- Recommend using terms in RDA appendices but other vocabularies acceptable

Non-Latin Materials

- Non-Latin data must always be provided in romanized form in BIBCO records (including authorized access points)
 - Use: ALA-LC Romanization Tables
- Optionally, may also add parallel fields containing data in non-Latin scripts
 - Use: PCC Guidelines for Creating Bibliographic Records in Multiple Character Sets

Use of Reliable Surrogates

- Ideally, cataloging of a tangible resource is done with the resource in hand
- However, if the resource is not available, may create a BIBCO record based a reliable surrogate
 - See BIBCO Participants' Manual, section F3 (p. 34-36)
- To be considered reliable, surrogate must be complete, must represent the same edition, and must allow the cataloger to create a record that fulfills all the requirements of the BSR RDA MAP
- Record must have a 588 field identifying the surrogate used
 - BIBCO members may subsequently update the record with the resource in hand and remove the 588 field

1. To correct errors

- Errors in MARC tagging
- Typographical errors
- Make sure to compare the information in the bibliographic record against the resource being described

- 2. To reflect changes in the publication
 - Integrating resources: Modify the record as needed when using an existing BIBCO record for an integrating resource (print or electronic) to ensure the ongoing accuracy of the description
 - Multipart monographs: Modify the existing record(s) to reflect the changes undergone over the course of the publication cycle

- 3. To add, change, or delete subject headings
 - To reflect changes in established vocabularies, changes of practice in heading or subdivision assignment, etc.
 - To make changes to subject fields that clearly do not correlate with the subject matter of the publication

- 4. To add, change, or delete classification fields
 - To reflect changes in classification schemes
 - Exception: Do not change classification numbers assigned by national bibliographic agencies; add a separate field instead

- 5. To correct authorized access points
 - To reflect changes to associated name authority records made since the BIBCO record was first contributed

 In general, an authenticated record need not be updated merely to reflect changes in cataloging codes or BIBCO practice

BIBCO Record Review

- Responsibilities of the institution under review:
 - Create BIBCO records in a timely manner after training
 - Review records locally before submitting for official review
 - Submit records in reasonable quantities to the reviewer each time, designating the OCLC symbol of the reviewer's institution
 - Revise records according to reviewer's comments before sending new ones
 - Build reviewing skills locally for sustained participation in the BIBCO program
 - Enter institution's BIBCO statistics in the PCC Directory system

BIBCO Record Review

Responsibilities of the BIBCO reviewer:

- Provide feedback within a week, if possible, to maintain local workflow and timely contribution of records to shared databases
- Respond to questions promptly
- Let reviewees know of any temporary interruptions that will affect the review process (e.g. vacation)
- Track progress of the institution under review
- Consult with the LC BIBCO program staff as needed
- Report the independent status of the library to LC BIBCO program staff

BIBCO Record Review

- Evaluation criteria for independence:
 - Proper MARC 21 coding
 - 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
 - Meet input standards of the utility
 - Total number of records varies by institution. General rule of thumb: Each cataloger contributes approximately 20 records, institution contributes approximately 80-100 records or quantity "sufficient to assure consistent high quality"

Guidelines for Reporting Statistics

- Institutions keep track of their own statistics and enter them into the PCC Directory
- Required to report statistics semi-annually
- Option to report more frequently (e.g., monthly)



Guidelines for Reporting Statistics

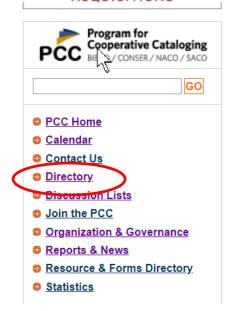
Categories:

- New BRs: Newly-authenticated BIBCO records (whether original cataloging or authentication of existing non-BIBCO records)
- Changed BRs: Updates to existing BIBCO records (provided the changes have been contributed to a bibliographic utility rather than only in your local database).

Note: Reporting this 2nd category is <u>optional</u>.

https://www.loc.gov/aba/pcc/pccd/

CATALOGING AND ACQUISITIONS





PCC Directory Guidelines

Programs of the PCC: BIBCO CONSER NACO SACO

The documentation on this page covers setting up PCC Directory accounts (after being approved to join the PCC), logging in to the system, reporting statistics, and voting in PCC elections.

Login:

Once you have activated your account, use this URL to login to the PCC Directory: https://pccdirectory.loc.gov

Passwords:

- · Passwords must be at least 16 characters in length.
- Passwords expire every 180 days. One week prior to password expiration, the system will email you a link to change your
 password. If you allow your password to expire, you will not be able to login. If this happens, please contact us at
 pccd@loc.gov so we can reset your password.
- If your password has not yet expired, you can use the "Forgot Password?" link on the login page to get a new password.
- Accounts are automatically locked if not logged into for 1 year. Resetting passwords when notified by an email prior to
 password expiration, and logging into the account with the new password, will avoid having accounts locked because of

Statistics:

Since FY 2019, the PCC Directory has been used by PCC members for recording and running reports on PCC statistics. Please report BIBCO, CONSER, NACO, and SACO statistics at minimum twice a year. Members may optionally enter statistics more frequently than twice a year (e.g., on a monthly or quarterly basis), if preferred.

Deadlines: **April 15th** (for entering October to March statistics) and **October 15th** (for entering April to September statistics). NOTE: If you are unable to report your institution's PCC statistics because of the disruptions to everyday workflows caused by the COVID-19 coronavirus pandemic, you may report them at a later date.

- · Guidelines for entering statistics in the PCC Directory (PDF; 194 KB)
- Obtaining your PCC NACO statistics via the OCLC Usage Statistics Portal (PDF; 350 KB) (for OCLC Connexion users)
- PCC program statistics (FY2008 to present)



Statistics on PCC Website

- LC staff maintain the PCC Statistics page on the PCC website:
 - Run reports semiannually to compile the statistics reported by PCC participants
 - Post compilations to the PCC Statistics page

https://www.loc.gov/aba/pcc/stats.html

CATALOGING AND **ACQUISITIONS**



- PCC Home
- Calendar
- Contact Us
- Directory
- Discussion Lists
- Join the PCC
- Organization & Governance
- Reports & News
- Resource & Forms Directory
- Statistics
- Training Portal





➡Print Subscribe Share/Save QGive Feedback

PCC Statistics

Programs of the PCC:

BIBCO

CONSER

NACO

SACO

PCC Statistics: BIBCO, CONSER, NACO, and SACO Programs

The PCC Directory system has been used for recording and running reports on PCC statistics since Oct. 1, 2018. Members should report BIBCO, CONSER, NACO, and SACO statistics at minimum twice a year. Members may optionally enter statistics more frequently (e.g., on a monthly or quarterly basis), if preferred.

Please refer to the PCC Directory Guidelines for further information on reporting PCC statistics.

Current Fiscal Year's Statistics: FY2024 (October 2023-September 2024). Note: Statistics for each PCC program are displayed on a separate tab.

- FY2024 MidYear (October 2023-March 2024) [to be posted late April 2024]
- FY2024 Annual (October 2023-September 2024) [to be posted late October 2024]

Previous Fiscal Years' Statistics

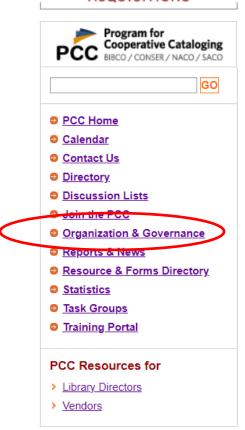
- FY2023 MidYear (October 2022-March 2023) [XSLX: 60KB]
- FY2023 Annual (October 2022-September 2023) [XSLX: 62KB]

PCC Governance

- Policy Committee (PoCo)
 - Annual elections (May)
 - Annual meetings (November)
- Operations Committee (OpCo)
 - Annual meetings (May)
- Standing committees
- Advisory committees
- Liaisons with external organizations

https://www.loc.gov/aba/pcc/about/pcc-org.html

CATALOGING AND ACQUISITIONS



PCC Organization & Governance

Programs of the PCC: BIBCO CONSER NACO SACO

Print Subscribe 25

Members of PCC Governing Committees

- Policy Committee
- Steering Committee
- Liaisons

Standing Committees

- Standing Committee on Applications
- > Standing Committee on Standards
- Standing Committee on Training

Advisory Committees

- Advisory Committee on Equity, Diversity, Inclusion, Belonging, and Accessibility
- > Identity Management Advisory Committee
- Linked Data Advisory Committee

Liaisons

- > ALA/Core Liaison
 - > Term, Selection, and Responsibilities of the ALA/Core Liaison to PCC [PDF; 119 KB]
- > CC:DA Liaison (Committee on Cataloging: Description & Access)
- > ISNI Library Sector Steering Group Liaison
- > ISSN International Centre Liaison
- > LD4P Liaison (Linked Data for Production)
- MAC Liaison (MARC Advisory Committee)
- OCLC FAST Policy and Outreach Committee Liaison
- > SAC (Subject Analysis Committee) Subcommittee on Faceted Vocabularies Liaison
- > ShareVDE Advisory Council Liaison
- > SkyRiver Liaison

Other PCC Activities

- Task groups
- Training and reviewing
- Discussion lists (PCCLIST, BIBCO, etc.)
- Meetings
 - PCC Participant's Meeting at ALA Annual
 - Virtual meetings throughout the year

PCC Code of Conduct

THANK YOU!

Questions?

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