PUNCTUATE THE POSITIVE, OR ELIMINATE THE NEGATIVE

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AGENDA

- Definitions
- Program for Cooperative Cataloging (PCC) Policy
- Online Computer Library Center (OCLC) Policy
  - ❖ Editing records
  - ❖ Omitting and retaining punctuation
- Bibliographic records

WHAT DO WE MEAN BY ...

- ISBD punctuation – all punctuation that coincides with MARC coding not just punctuation prescribed by the ISBD standard - a relationship exists between prescribed ISBD punctuation and the identification of specific subfield data

- Final punctuation – terminal periods or punctuation at the end of a field

- Medial punctuation – punctuation that appears at the end of a subfield and often signals what appears in the next subfield

- Minimal punctuation – a record created with most punctuation, but not necessarily all punctuation, omitted

International Standard Bibliographic Description (ISBD) punctuation for cataloging means all the punctuation as described in MARC coding.

Final punctuation is at the end of a field, and the field is determined by MARC coding. For example: field 300 may end in no punctuation, may end in a right parenthesis when the last element of the field is a parenthetical qualifier, or may end in a period when the last element is an abbreviation ("cm" and "mm" are not treated as abbreviations) or a 490 field is present in the record.

Medial punctuation – usually occurs at the end of a subfield indicting when the next subfield appears.

Minimal punctuation means just that – there may be some 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 allows for (Fixed Field element):
  ❖ Inclusion of punctuation in RDA records **Desc = i**
  ❖ Omission of final punctuation in RDA records **Desc = i**
  ❖ Omission of final & medial punctuation in RDA records **Desc = c**
  ❖ Newly created PCC records may be entered directly into the database with
    minimal punctuation

When providing records including ISBD punctuation the Description (Desc) which is found in the Fixed Field element will be coded with an "i" indicting the use of ISBD punctuation.
Omitting the final punctuation the Desc will also be coded with an "i" indicating the use of ISBD punctuation for the majority of the record.
Omitting final and medial punctuation code the Desc with "c" stating that the ISBD punctuation has been omitted.
The Program for Cooperative Cataloging (PCC) is an international cooperative effort aimed at expanding access to library collections by providing useful, timely, and cost-effective cataloging that meets mutually-accepted standards of libraries around the world. The rationale for removing the ISBD punctuation is that since the ISBD punctuation was designed for the card catalog format, it is now an unnecessary burden within MARC; removing punctuation helps prepare the catalogs for linked data, it is compatible with BIBFRAME.

OCLC POLICY THEN AND NOW

- 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

    An essay on man ‡b an introduction to a philosophy of human culture ‡c by Ernst Cassirer.
    An essay on man **:** ‡b an introduction to a philosophy of human culture **/** ‡c by Ernst Cassirer.

- New OCLC policy 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
    - ❖ Code the Desc fixed field element as appropriate

In OCLC policy from BFAS codes *c* and *i* both specify the use of ISBD as the basis for the descriptive cataloging, with code *c* indicating the omission of punctuation and code *i* indicating the inclusion of punctuation. Codes blank and *n* both specify that the basis for the description is a non-ISBD standard, with code *n* indicating the omission of punctuation. The presence of codes *c* or *n* indicating the omission of punctuation could allow programs to supply appropriate display punctuation. If a bibliographic record indicates RDA cataloging in field 040 subfield ‡e, then the *Desc* will be *c* or *i*. I will show an example of this later in the presentation.

WHAT TO DO UNDER NEW 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

Basically, do not change the master record if the punctuation of the existing record is coded with "c" or "i" and rda in subfield e in the 040; however you are allowed to add or delete punctuation in your local record based on your local policy.
For example the local policy for SHARE catalogers is: Best practice for SHARE Bibliographic records must include full ISBD punctuation, including punctuation between subfields, and ending punctuation. New records created by the Program for Cooperative Cataloging (PCC) may optionally omit or relocate some ISBD punctuation. It was decided to continue the use of full ISBD punctuation in records in Polaris because omitting punctuation results in a confusing and inconsistent display of records in the PAC view.
The Rock River Library Consortium does not have a formal policy at this time.
Resource Sharing Alliance (RSA) is to basically follow the pattern established in the record when enhancing a record but if you are creating a new record include ending punctuation. Their policy is still in the process of being finalized.

OCLC POLICY-RECORDS WITH MINIMAL PUNCTUATION

- Omit punctuation at the end of the preceding subfield in most cases

  An essay on man ‡b an introduction to a philosophy of human culture ‡c by Ernst Cassirer

- Omit parentheses around geographic coordinates and series statements as well as qualifier subfields in fields other than access points

  Scale approximately 1:1,267,200. 20 miles to an in. ‡c W 92°--W 87°/N 43°--N 37°
  Joseph G. Cannon's first term in Congress 1873 to 1875 ‡c Timothy Ohrea Smith.

- Omit terminal periods following the displayed text unless the field ends with an abbreviation or initial

  Making sense as a school leader ‡c Gordon A. Donaldson Jr.

OCLC policy for minimal punctuation:
Omit punctuation at the end of field.
Omit parentheses in geographic coordinates and series statements in 490 or 500, and other qualifiers that are not access points. In the example of the geographic location there would have been parenthesis around the coordinates.
Do not omit punctuation at the end of an abbreviation or initial.

OCLC POLICY-RECORDS WITH MINIMAL PUNCTUATION(CONT.)

- 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 for records with minimal punctuation created using RDA or AACR2 rules

> Desc c (code c rather than i if using RDA rules)
> 040 XXX ‡b eng ‡e rda ‡c XXX

> Desc c (code c rather than a if using AACR2 rules)
> 040 XXX ‡b eng ‡e aacr/2 ‡c XXX

The punctuation used in the authority file must be recorded exactly in the bibliographic record.

As stated earlier, the Desc for record with minimal punctuation will be coded with "c" or "i". If using RDA rules the subfield e in the 040 will be RDA and in minimal records using AACR2 rules the subfield e will be aacr/2.

OMITTING FINAL PUNCTUATION

- Omission of terminal periods is now optional for records with punctuation

  504 Includes bibliographical references.
  504 Includes bibliographical references

- Terminal periods are always omitted in records with minimal punctuation

- Retain any periods following initials or abbreviations

These are the general rules of omitting final punctuation.
No terminal punctuation unless following initials or abbreviations

OMITTING MEDIAL PUNCTUATION

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

    245 10 Better than the reaper **:** ‡b Plano's harvester history **/** ‡c Jeanne Valentine**.**
    245 10 Better than the reaper ‡b Plano's harvester history ‡c Jeanne Valentine

- Exceptions include some punctuation in access points, some punctuation that is to be relocated, and some punctuation that is to be retained such as information in subfield e

    300   1 audio disc **;** ‡c 4 3/4 in **+** ‡e 1 book (16 unnumbered pages **:** color illustrations **;** 29 cm)
    300   1 audio disc ‡c 4 3/4 in ‡e 1 book **(**16 unnumbered pages **:** color illustrations **;** 29 cm**)**

Rules for omitting medial punctuation:
Punctuation precedes the subfield; however, under the new PCC rules the punctuation may be omitted unless the punctuation is integral for clarity. In the 2nd example the punctuation in subfield e is important for readability. Since the descriptive information in subfield "e" does not contain subfields within itself, the punctuation is necessary.

RELOCATING OF 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

  245 10 Papá**,** por favor**,** bájame la luna **=** ‡b Papa**,** please get the moon for me**.**
  245 10 Papá**,** por favor**,** bájame la luna ‡b **=** Papa**,** please get the moon for me

  245 10 Oklahoma**! ;** ‡b Carousel **;** South Pacific **/**‡c Rodgers & Hammerstein**.**
  245 10 Oklahoma**!** ‡b **;** Carousel **;** South Pacific ‡c Rodgers & Hammerstein

Rules for relocation of punctuation:
Relocating the punctuation is an option when using the PCC guidelines for punctuation. Punctuation had always preceded the subfield, now the punctuation can come after the subfield. When transcribing the title from the title page maintain the punctuation displayed on the title page.

RETAINING INTEGRAL PUNCTUATION

Retain internal ISBD punctuation that appears within a subfield, i.e., when there is no separate subfield available.

• Space-equals-space indicates parallel language information within 245 $b

245 14 Les Ballets jazz de Montréal **:** ‡b 30 ans **:** Louis Robitaille**,** directeur artistique **=** 30 years **:** Louis Robitaille**,** artistic director **:** souvenir program**.**
245 14 Les Ballets jazz de Montréal ‡b 30 ans : Louis Robitaille**,** directeur artistique **=** 30 years : Louis Robitaille**,** artistic director : souvenir program

• Space-semicolon-space separates one statement of responsibility from another within 245 $c

245 14 The barn quilt **:** ‡b a Christmas story **/** ‡c Patti Michels **;** illustrated by Nate Myers**.**
245 14 The barn quilt ‡b a Christmas story ‡c Patti Michels **;** illustrated by Nate Myers

Rules for retaining integral punctuation:
Punctuation that establishes parallel titles or distinguishes statement of responsibility will remain in the record.

INTEGRAL PUNCTUATION-CONT.

- Space-semicolon-space used to separate extent from size within 300 $e
  - 300 1 audio disc ; ‡c 4 3/4 in + ‡e 1 book (16 unnumbered pages ; 29 cm)
  - 300 1 audio disc ‡c 4 3/4 in ‡e 1 book (16 unnumbered pages ; 29 cm)

- Retain punctuation that is integral to the data no matter where it appears
  - 245 14 The analysis of the law / ‡c Sir Matthew Hale. The students companion / Giles Jacob.
  - 245 14 The analysis of the law ‡c Sir Matthew Hale. The students companion / Giles Jacob

- Transcribed punctuation (e.g., exclamation points, question marks)
- Periods following abbreviations and initials (e.g., Jr., in., Inc.)
  - 245 10 It's Little Red Riding Hood ... or is it? / ‡c by Bro. Maze.
  - 245 10 It's Little Red Riding Hood ... or is it? ‡c by Bro. Maze

- Serial commas (e.g., one, two, three)
  - 300 2 audio discs (1 hr., 20 min., 3 sec.) : ‡b digital, CD audio ; ‡c 4 3/4 in.
  - 300 2 audio discs (1 hr., 20 min., 3 sec.) ‡b digital, CD audio ‡c 4 3/4 in.

As discussed earlier, retain punctuation in some subfields that contain space-semicolon-space, marks of omission, question marks etc, and retain the period after hr., min, sec, in. because they are approved abbreviations.
Basically retain punctuation that is integral to the data no matter where it appears.

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

• Information in the access point, including its punctuation, should match the information in the corresponding authority record

> 100 1 Gooding, David C. ‡q (David Charles), ‡d 1947-2009, ‡e author.
> 100 1 Gooding, David C. ‡q (David Charles), ‡d 1947-2009 ‡e author

• Retain punctuation separating names and titles in name-title access points

> 711 2 Conference on the African Refugee Problem ‡d (1979 : ‡c Arusha, Tanzania), ‡j author.
> 711 2 Conference on the African Refugee Problem ‡d (1979 : ‡c Arusha, Tanzania) ‡j author

Rules for retaining punctuation in access points:
Punctuation will be retained in access points with relation to separating dates, places etc., and will be recorded as it appears in the authority record. The punctuation for the relationship designator and the final punctuation will not be retained.

USING OCLC MACRO TO ADD OR DELETE PUNCTUATION
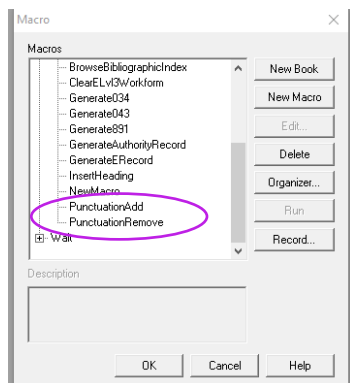
OCLC Macro:
In OCLC under Tools-Macros-Manage there is an option to add punctuation to the record or to remove punctuation from the record. Highlight the macro you wish to use, click Run and the macro with either eliminate or add punctuation to your bibliographic record.

WHAT THE BIBLIOGRAPHIC RECORD LOOKS LIKE

With punctuation

100	1		Kelly, Julia, ‡d 1986- ‡e author.
245	1	4	The whispers of war / ‡c Julia Kelly.
250			First Gallery Books hardcover edition.
264		1	New York : ‡b Gallery Books, ‡c 2020.
300			326 pages ; ‡c 24 cm
520			The start of World War II looms over three friends who struggle to remain loyal as one of them is threatened with internment by the British government.
776	0	8	‡i Online version: ‡a Kelly, Julia. ‡t The whispers of war. ‡b First Gallery Books hardcover edition. ‡d New York : Gallery Books, 2020 ‡z 9781982107819 ‡w (DLC) 2019027312

Without punctuation

100	1		Kelly, Julia, ‡d 1986- ‡e author
245	1	4	The whispers of war ‡c Julia Kelly
250			First Gallery Books hardcover edition
264		1	New York ‡b Gallery Books ‡c 2020
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Here is an example of what a MARC record looks like with and without punctuation. The MARC record without punctuation looks very odd to us, but because we can at least see the subfields, it is readable.

PAC VIEW
(PUBLIC ACCESS CATALOG)

With punctuation

Title:	The ***whispers of war*** / Julia Kelly.
Format:	Book
Author:	Kelly, Julia, 1986- author.
Edition:	First Gallery Books hardcover edition.
Publisher, Date:	New York : Gallery Books, 2020.
Description:	326 pages ; 24 cm
Summary:	The start ***of*** World ***War*** II looms over three friends who struggle to remain loyal as one ***of*** them is threatened with internment by the British government.

2020

Without punctuation

Title:	The ***whispers of war*** Julia Kelly
Format:	Book
Author:	Kelly, Julia 1986- author
Edition:	First Gallery Books hardcover edition
Publisher, Date:	New York Gallery Books 2020
Description:	326 pages 24 cm
Summary:	The start ***of*** World ***War*** II looms over three friends who struggle to remain loyal as one ***of*** them is threatened with internment by the British government.

2020

When looking at a record in the PAC, it is a little more difficult to read since there is no stopping point between each element.

RESOURCES

- OCLC *Bibliographic Formats and Standards* (https://www.oclc.org/bibformats/en.html)

- OCLC's AskQC (https://help.oclc.org/WorldCat/Metadata_Quality/AskQC)

- PCC's Policy *Guidelines for Minimally Punctuated MARC Records* (https://bit.ly/3d54rVl)

- PCC's *Training for Minimally Punctuated MARC Bibliographic Records* at (https://bit.ly/30yp6vY)

ON THE CALL TODAY

Questions? Contact the CMC:
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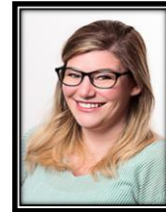
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