

## RDF representation of RDA relationship designators. Appendix 5: Issues relating to minor changes in the RDA Toolkit

### Issues for RDA Toolkit Appendix I

The development of unconstrained and inverse properties has identified a number of specific cases in RDA Toolkit Appendix I where improvements can be made in consistency, clarity, and simplicity. These will in turn improve the utility of the element sets.

#### Inconsistent definitions

The definitions for the RDA element set properties for the high-level categories of designator in RDA Toolkit Appendix I are taken from the RDA Toolkit Glossary, and are much more inconsistent in phrasing than the designators themselves.

The Glossary definition of "contributor" is "A person, family, or corporate body contributing to the realization of a work through an expression." The phrase "realization of a work through an expression" is unique, requiring a specific replace operation to synchronize with the unconstrained definition. It could be replaced simply by "expression".

**Recommendation:** Make the Glossary definitions of high-level designator categories in RDA Toolkit Appendix I more consistent through the Fast-track process.

The designator definitions of "current owner", "custodian", "former owner", "owner" contain the phrase "(i.e., a specific copy or instance of a resource)" to qualify the term "item". For example the definition of "custodian" is "A person, family, or corporate body having legal custody of an item (i.e., a specific copy or instance of a resource)". The phrase in brackets appears to be redundant and inconsistent with the established patterns.

The designator definition of "speaker" is "A type of performer contributing to an expression of a work by speaking words, such as a lecture, speech, etc". The phrase "type of" is redundant, and inconsistent with the established patterns.

The designator definition of "voice actor" is "A performer contributing to an expression of a work by providing the voice for characters in radio and audio productions and for animated characters in moving image works, as well as by providing voice-overs in radio and television commercials, dubbed resources, etc". The designator is indicated in the RDA Toolkit (through indentation) as a sub-type of "actor", which itself is a sub-type of "performer". The definitions of other sub-types use the term for the immediate type, so to improve consistency the phrase "A performer" should be replaced with "An actor".

**Recommendation:** Make the specific designator definitions identified in RDA Toolkit Appendix I more consistent through the Fast-track process.

The designator definition of "plaintiff" is "A person or corporate body who brings a suit in a civil proceeding". Presumably in some legal systems a family is treated as a separate entity, so it should be included in the definition.

The designator definitions of "appellant", "appellee", "court governed", "enacting jurisdiction", "jurisdiction governed" do not contain any references to FRBR or FRAD entities. Coherency of the designators and utility of the element set properties would be improved if the relationship between "court" and "jurisdiction" and the FRBR Corporate Body entity was made explicit in the definitions.

**Recommendation:** Review the specific designators identified in RDA Toolkit Appendix I to improve consistency and clarity.

The definitions of several designators in RDA Toolkit Appendix I use the phrase "the work" or "the item" in contexts which are inconsistent with the standard pattern which uses the indefinite article to refer to the domain of the designator. These are:

addressee	work
arranger of music	work
dedicatee	work
dedicator	work
depositor	item
host institution	work
issuing body	work
sponsoring body	work

**Recommendation:** Make the specific designator definitions identified in RDA Toolkit Appendix I more consistent in use of indefinite articles through the Fast-track process.

## Issues for RDA Toolkit Appendix J

The development of unconstrained properties has identified a number of specific cases in RDA Toolkit Appendix J where improvements can be made in consistency, clarity, and simplicity. These will in turn improve the utility of the element sets.

### Inconsistent definitions

The term "entity" is used in several definitions. For example, the designator definition of "abridged as (expression)" is "An expression of a work that shortens the source entity without changing the general meaning or manner of presentation", whereas the designator definition of "abridged as (work)" is "A work that shortens the source work without changing the general meaning or manner of presentation". There seems to be no reason why "entity" in the expression designator definition cannot be replaced with "work".

The term "entity" is not defined in the RDA Toolkit, although in some cases it seems to refer collectively to the FRBR group 1 terms. To maintain consistency with FRBR terminology, it would be better to use the phrase "work, expression, manifestation, or item" instead of "entity", or a subset where appropriate. This phrase is the basic definition of "resource" in the RDA Toolkit Glossary. Usage of "entity" is prevalent in Expression designators.

**Recommendation:** Review the definitions using the term "entity" in RDA Toolkit Appendix J and replace them with FRBR terms to improve consistency and clarity.

The designator definition of "evaluated in (expression)" is "An expression of a work that examines or judges the described entity", while the definition of "evaluated in (work)" is "A work that examines or judges the source work". There seems to be no reason why "described" in the expression designator definition should not be replaced with "source" for consistency.

The designator definition of "facsimile of (item)" is "A particular item used as the basis for an exact reproduction", while the definition of "facsimile of (manifestation)" is "A manifestation used as the basis for an exact reproduction". The term "particular" in the item designator definition seems to be redundant.

The designator definition of "finding aid for (expression)" is "An expression of an archival collection used as the basis for a finding aid, i.e., a guide to the organization, arrangement, and contents of the collection", while the definition for "finding aid for (work)" is "An archival collection that is described in a finding aid, i.e., a guide to the organization, arrangement, and contents of the collection". There seems to be no reason for the differences in phrasing.

The designator definition of "musical variations (expression)" is "An expression of a musical work in which melodic, thematic, or harmonic material from the source work is taken to form a discrete theme, which is repeated one or more times with subsequent modifications", while the definition of "musical variations (work)" is "A musical work in which melodic, thematic, or harmonic material is taken from the source work to form a discrete theme, which is repeated one or more times with subsequent modifications". There seems to be no reason for the differences in phrasing.

**Recommendation:** Make the specific designator definitions identified in RDA Toolkit Appendix J more consistent through the Fast-track process.

### Property labels

The labels of the following designators in RDA Toolkit Appendix J do not require disambiguation with a FRBR/FRAD qualifier:

- contains facsimile of (manifestation)
- facsimile contained in (manifestation)
- in series (work)
- series contains (work)
- subseries (work)
- subseries of (work)

The use of ellipses in RDA Toolkit Appendix J designator labels "merged with ... to form ... (expression)" and "merged with ... to form ... (work)" is not user-friendly. A better generic label is "merged to form" as the semantic content replaced by ellipses is the same as the FRBR qualifier in brackets; for example "merged with expression to form expression". The first FRBR term is not required because the designator is part of the Expression-Expression category.

**Recommendation:** Simplify the labels of the specific designator categories identified in RDA Toolkit Appendix J through the Fast-track process.

The labels of RDA Toolkit Appendix J designators "derivative expression", "derivate work", "equivalent item", and "equivalent manifestation" contain FRBR terms to disambiguate them, but do not follow the standard pattern of enclosing them in parentheses.

**Recommendation:** Make the labels of the specific designator categories identified in RDA Toolkit Appendix J consistent with the disambiguation pattern through the Fast-track process.

### Missing inverse designators

The following designators do not have inverse designators allowed by definitions:

Designator label	Definition
analysis of item	An item that has been examined to identify its components and their relations.
analysis of manifestation	A manifestation that has been examined to identify its components and their relations.
commentary on (item)	An item used as the basis for a set of explanatory or critical notes.
commentary on (manifestation)	A manifestation used as the basis for a set of explanatory or critical notes.
critique of (item)	An item used as the basis for a critical evaluation.
critique of (manifestation)	A manifestation used as the basis for a critical evaluation.
description of (item)	An item described by a describing entity.
description of (manifestation)	A manifestation described by a describing entity.
digital transfer of (item)	An item transferred from one digital format to another.
electronic reproduction of (item)	An analog item used as the basis for an electronic reproduction.
evaluation of (item)	An item that is examined or judged.
evaluation of (manifestation)	A manifestation that is examined or judged.
facsimile of (item)	A particular item used as the basis for an exact reproduction.
preservation facsimile of (item)	An item used as the basis for an exact reproduction on preservation-quality media, such as acid-free permanent or archival paper.
reprint of (item)	An item that is used as the basis for a reprint with the same content as the resource being described.
reproduction of (item)	A particular item used as the basis for a reproduction.
review of (item)	An item used as the basis for a brief evaluation.
review of (manifestation)	A manifestation used as the basis for a brief evaluation.

RDA Toolkit Appendix J groups these designators under relationships between the same entity, that is item-to-item or manifestation-to-manifestation. There is some ambiguity between these groups and the definitions. See also the discussion about the term "entity" in the *Inconsistent definitions* section above.

**Recommendation:** Add designators with labels and definitions for the inverses of the specific designators identified in RDA Toolkit Appendix J.

## Issues for RDA Toolkit Appendix K

RDA Toolkit Appendix K notes that "The relationship designators in this appendix are provisional. They will be reviewed and revised as necessary." The development of inverse properties has identified a number of specific cases where improvements can be made in consistency, clarity, and simplicity. These will in turn improve the utility of the element sets.

### Lack of identification of inverse designators

Designators which are inverses of each other are not explicitly noted, as they are in RDA Toolkit Appendix J. The inverses can only be determined by comparing definitions in a consolidated list which has to be compiled in advance. The utility of Appendix K would be improved if inverse designators were identified.

**Recommendation:** Add text to RDA Toolkit Appendix K to indicate pairs of inverse properties, to improve utility.

### Ambiguous labels

The labels "founded corporate body" and "sponsored corporate body" are used for different designators with Person, Family, and Corporate Body as their domains. The standard pattern is to disambiguate labels with the FRBR/FRAD entity.

**Recommendation:** Disambiguate the specific designator labels identified in RDA Toolkit Appendix K using the standard pattern through the Fast-track process.

### Inconsistent definitions

The designator definition of "descendants" is "A family descended from the particular person". The word "particular" is extraneous because it can only refer to the single person domain of the designator, and it is not used in the standard pattern. It should be removed to improve consistency and simplicity.

The designator definition of the Person variant of "founded corporate body" is "An organization that the person founded" the definition of the Family variant is "An organization that the family founded", and the definition of the Family variant of "sponsored corporate body" is "An organization that the family sponsors". The standard pattern is to use "corporate body" rather than "organization" in the definition, so the definitions should be amended to improve consistency.

**Recommendation:** Make the specific designator definitions identified in RDA Toolkit Appendix K more consistent through the Fast-track process.

### Missing inverse designators

The following designators do not have inverse designators allowed by definitions:

Designator label	Definition
descendant family	A family descended from the other family.
family member	A person who is a member of the family.
incumbent	A person holding an office in the corporate body.
product of a merger	A corporate body that resulted from a merger of two or more other corporate bodies.

product of a split	A corporate body that resulted from a split or division of the other corporate body.
sponsor	A person sponsoring the corporate body.

**Recommendation:** Add designators with labels and definitions for the inverses of the specific designators identified in RDA Toolkit Appendix K.

## Relationship elements

The term "relationship element" is not defined anywhere in the RDA Toolkit, although it is used in several places.

**Recommendation:** Add the term "relationship element" to the RDA Toolkit Glossary with a definition.

The use of indefinite articles is inconsistent in the labels of relationship elements, for example "manifestation of a work" and "manifestation of expression".

**Recommendation:** Decide on a consistent pattern for definitions of relationship elements and make the RDA Toolkit Glossary more consistent through the Fast-track process.

The designator definition of "related item" is "An item, represented by an identifier or a description, that is related to the resource being described (e.g., an item used as the basis for a microform reproduction)" and of "related manifestation" is "A manifestation, represented by an identifier or a description, that is related to the resource being described (e.g., a manifestation in a different format)". The generic term "resource" is used instead of FRBR group 1 entity, but the examples suggest that only a single FRBR entity is the domain of each designator. This is ambiguous, and makes it difficult to assign a domain.

**Recommendation:** Clarify the semantics of the definitions of the identified relationship elements through the Fast-track process.

## Recommendations

1. Make the Glossary definitions of high-level designator categories in RDA Toolkit Appendix I more consistent through the Fast-track process.
2. Make the specific designator definitions identified in RDA Toolkit Appendix I more consistent through the Fast-track process.
3. Review the specific designators identified in RDA Toolkit Appendix I to improve consistency and clarity.
4. Review the definitions using the term "entity" in RDA Toolkit Appendix J and replace them with FRBR terms to improve consistency and clarity.
5. Make the specific designator definitions identified in RDA Toolkit Appendix J more consistent through the Fast-track process.
6. Simplify the labels of the specific designator categories identified in RDA Toolkit Appendix J through the Fast-track process.

7. Make the labels of the specific designator categories identified in RDA Toolkit Appendix J consistent with the disambiguation pattern through the Fast-track process.
8. Make the specific designator definitions identified in RDA Toolkit Appendix I more consistent in use of indefinite articles through the Fast-track process.
9. Add text to RDA Toolkit Appendix K to indicate pairs of inverse properties, to improve utility.
10. Disambiguate the specific designator labels identified in RDA Toolkit Appendix K using the standard pattern through the Fast-track process.
11. Make the specific designator definitions identified in RDA Toolkit Appendix K more consistent through the Fast-track process.
12. Add designators with labels and definitions for the inverses of the specific designators identified in RDA Toolkit Appendix J.
13. Add designators with labels and definitions for the inverses of the specific designators identified in RDA Toolkit Appendix K.
14. Add the term "relationship element" to the RDA Toolkit Glossary with a definition.
15. Decide on a consistent pattern for definitions of relationship elements and make the RDA Toolkit Glossary more consistent through the Fast-track process.
16. Clarify the semantics of the definitions of the identified relationship elements through the Fast-track process.