To: Joint Steering Committee for Development of RDA

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Subject: Categorization of content and carrier

Related document:
5JSC/Chair/10 *(RDA/ONIX Framework for Resource Categorization* (version 1.0))
5JSC/RDA/Part A/Categorization (*Categorization of content and carrier*)

Categorization of content and carrier in RDA is provided by three elements: Media type (RDA 3.2), Carrier type (RDA 3.3), Content type (RDA 6.9).

The definition of these elements and their values was based on the work of the GMD/SMD Working Group (5JSC/Chair/6/Chair follow-up) and on the *RDA/ONIX Framework for Resource Categorization*, version 1.0 (5JSC/Chair/10). This revised document has been updated to take into account decisions made by the JSC since August 2006, including the renaming of the three RDA categorization elements and the definition of additional categories.

This document discusses the objectives of the resource categorization elements, the alignment with the *RDA/ONIX Framework*, and related issues. A set of tables provides a detailed mapping of the RDA values to the RDA/ONIX BaseCarrierCategories and BaseContentCategories.

Objectives

The primary function of the RDA elements for Content type, Media type, and Carrier type is to assist the user in selecting resources that are appropriate to their needs with respect to type of content and type of carrier. The terms or values defined for each of these elements are referred to in this document as *categories*, to emphasize that their primary purpose is to identify categories of content and carrier, not necessarily to provide a retrieval or display vocabulary.

The categories defined under the three elements have been designed to meet the following objectives:

- *Comprehensiveness*. The categories defined for each element should cover as fully as possible the range of categories that may be applicable to the resource described.
- *Clarity*. The scope of each category should be stated in clear and unambiguous terms.
- *Extensibility*. The categorization framework should be amenable to future extension to accommodate newly emerging types of content, media, and formats.
- *Compatibility*. The categories defined for each element should be compatible, as far as possible, with those defined by other resource description communities.
- *Adaptability*. The display of category labels should be adaptable to the needs and preferences of specific user communities.

Alignment with the RDA/ONIX Framework for Resource Categorization

The RDA elements for Content type, Media type, and Carrier type have been designed to conform to the *RDA/ONIX Framework for Resource Categorization* (version 1.0).

Base categories. Base categories are those that are completely defined in terms of the primary values defined within the RDA/ONIX Framework.

The RDA categories defined for **Content type** represent a concatenation of four attributes of resource content with primary values defined in the Framework:

- *Character* (i.e., the fundamental form of communication in which the content of the resource is expressed)
- *Sensory Mode* (i.e., the human sense through which the content of a resource is intended to be perceived)
- *Image Dimensionality* (i.e., the number of spatial dimensions in which the image content of a resource is intended to be perceived)
- *Image Movement* (i.e., the perceived presence or absence of movement in the image content of a resource).

The RDA categories defined for **Media type** reflect the attribute of resource carrier defined in the Framework as *Intermediation Tool* (i.e., the type of device intended to be used to enable the content of the resource to be perceived).

The RDA categories for **Carrier type** represent a concatenation of Intermediation Tool with two additional attributes of carrier, also with primary values defined in the Framework:

- *Storage Medium Format* (i.e., the physical form of the material on which the content of the resource is stored)
- *Housing Format* (i.e., the physical format of the encasing for the storage medium).

The accompanying tables provide mappings of the RDA categories to the corresponding attribute values specified in the RDA/ONIX Framework for the construction of Base Content Categories and Base Carrier Categories. The mappings serve as a means of providing a formal RDA/ONIX definition or ontology for each of the RDA categories. Those formal definitions, in turn, will serve as the basis for developing crosswalks between RDA categories and categories used in ONIX, as well as with other categorizations with mappings to the RDA/ONIX Framework (such as ISBD Area 0).

Qualified categories. Qualified categories qualify base categories by adding values which are defined locally and not specified in the Framework. These can be a sub-value of a primary value, or a value from an additional attribute which has no primary values, such as Form/Genre. A qualified category is automatically mapped to a base category by collapsing sub-values into their super-value and ignoring any additional attribute values.

Certain of the RDA categories for Carrier type and Content type represent qualified categories:

The sub-values defined for purposes of constructing RDA Qualified Categories for **Media type** are:

> *Sub-values of RDA/ONIX primary values for Intermediation Tool.* For example, values for *aperture card reader*, *microfiche reader*, *microopaque reader*, and *microfilm reader* (devices designed for use with aperture cards, microfiches, microopaques, and microfilm, respectively) are defined as RDA sub-values of the RDA/ONIX primary value *microform reader* (a device that magnifies microforms for reading with the unaided eye). Those sub-values are used in combination with a number of RDA/ONIX Base Categories to differentiate microfiche cassettes from microfilm cassettes, etc. Similar RDA sub-values have been defined as sub-values of the RDA/ONIX primary value *projector* to differentiate slides from overhead transparencies, etc.

The sub-values defined for purposes of constructing RDA Qualified Categories for **Carrier type** are:

Sub-values of RDA/ONIX primary values for Storage Medium Format. For example, a value for *card* (a small sheet of opaque material) is defined as an RDA sub-value of the RDA/ONIX primary value *sheet* (a flat piece of thin material—paper, plastic, etc.—usually rectangular in shape). The sub-value for *card* is used in combination with a number of RDA/ONIX Base Categories to differentiate carriers in a card format from those in a more generic sheet format.

The values and sub-values defined for purposes of constructing RDA Qualified Categories for **Content type** are as follows:

1. *A sub-value of RDA/ONIX primary value for Character*: The value *movement* (content expressed in movement of the human body) is defined as an RDA sub-value for the RDA/ONIX primary value *other* for the *Character* attribute. The sub-value for *movement* is used in combination with primary values for the *Sensory Mode* attribute to create the Qualified Content Categories *notated movement* and *tactile notated movement*.
2. *Values for Form/Genre*: RDA values for the Base Content Attribute *FormGenre* are defined as follows:

   Cartographic. An RDA value is defined for *cartographic* (content representing the whole or part of the Earth or any celestial body at any scale). This value is used in combination with a number of RDA/ONIX Base Content Categories to differentiate cartographic content from other types of content.

   Computer. An RDA value is defined for *computer* (content consisting of digitally encoded data or instructions intended to be processed by a computer). This value is used in combination with a number of RDA/ONIX Base Content Categories to differentiate content intended for computer processing from other types of content.

The RDA-defined values and sub-values used in the construction of Qualified Categories enhance the precision of crosswalks between RDA and other categorization schemes. For example, the RDA Character sub-value *movement* improves the alignment with the ISBD Content form value *movement*.

In the accompanying tables, the RDA values and sub-values — and the categories based on them — have been identified by shading. Sub-values have been indented (vertically) in the column to the right of the applicable RDA/ONIX primary value.

Levels of specificity

The categories for Content type and Media type are defined at a broad level, roughly paralleling the General Material Designations given in list 1 of AACR2 rule 1.1C1. They are designed to assist the user in selecting resources appropriate to their needs on the basis of very general characteristics of the content and carrier of the resource.

The categories for Carrier type are defined at a more specific level, roughly paralleling the Specific Material Designations given in rule .5B in AACR2 chapters 2 through 12.

The categories for Carrier type do not incorporate the additional level of specificity recommended by the GMD/SMD Working Group. In general, that additional level of specificity tends to involve attributes of the carrier that are recorded in other RDA elements such as production method (etching, lithograph, woodcut, etc.), medium (acrylic, oil, watercolour, etc.), digital characteristics (ASCII, GIF, HTML, JPEG, etc.), and other characteristics of videorecordings (Betamax, VHS, etc.).

Relationship between Carrier type and Extent

The RDA elements Carrier type and Extent serve different purposes and, in some cases, use different terminology. The RDA instructions enable the separation of controlled terms recorded in the Carrier type element and the display of natural-language terms in the Extent element.

For certain formats, the RDA instructions for recording extent given at RDA 3.4 specify the terms for Carrier type listed at RDA 3.3 as terms to be used to designate the type of unit when expressing extent.

For a number of other formats (books, scores, maps, etc.), the instructions given at RDA 3.4 do not specify terms listed at RDA 3.3 as terms to be used to designate the type of unit when expressing extent. Those instructions reflect established conventions for indicating the extent of resources in those formats. The terms defined for RDA 3.3 to designate Carrier type have no direct bearing on those instructions.

The instructions on recording extent include the option at RDA 3.4.1.5 to use a term in common usage to record the specific format of the carrier instead of a term listed at RDA 3.3.

Terminology

The terms used to designate categories in RDA 3.2, 3.3, and 6.9 are designed to reflect common usage. However, it is recognized that usage varies from one community to another and changes over time. The terms should be treated simply as "labels" to designate the categories.

RDA contains instructions to record the terms listed. In addition, RDA makes allowance for using alternative vocabularies, including those consisting of coded values. The instructions do not prescribe how the categories are to be displayed. The intent is to provide agencies using RDA flexibility to adapt displays to the needs and preferences of their user communities. Agencies may choose to be selective in which elements they display, and may display them either as separate elements or in combination. They may also choose to display the categories using different terms than those that are listed at RDA 3.2, 3.3, and 6.9. The only requirement is that the elements be recorded so that they map directly to the categories as they are defined.

Maintenance

The base categories in release 1 of the RDA/ONIX Framework are optimized for physical resources. It is possible to create additional base categories by adding other attributes with primary values, such as Revision Mode or Generation, although some of these are currently treated as separate RDA elements. This flexibility may be of use, for example in the construction of machine-actionable extent vocabularies or development of form and genre elements in RDA.

New RDA Media type, Carrier type, and Content type categories may be added as needed. Such categories should be defined in terms of the appropriate RDA/ONIX values, including RDA-defined values and sub-values. New terms should be added to the tables appended to this document.

A definition for each new category should be added to the RDA Glossary, and to the list of "RDA Categories and Definitions" appended to this document.

New RDA-defined values and sub-values may be added at the discretion of the Joint Steering Committee. A list of RDA-defined values and sub-values is appended to this document.

Changes to the attributes, primary values, and definitions in the RDA/ONIX Framework may be made with the joint approval of the ROF partners (RDA, ONIX, and ISBD).