RDA Toolkit Workshop: A Crash Course

A half-day Pre-Conference Workshop
ALA Midwinter, Philadelphia
January 24, 2020
Whatever happened to...?

Melanie Polutta
LC Member of NARDAC
Cataloging Policy Specialist, Library of Congress
Whatever happened to...?

• Core instructions
• Instruction numbers
• Sources of information
• Examples
Core instructions

CORE ELEMENT
Core instructions

2.3.2 Title Proper
CORE ELEMENT

2.3.2.1 Scope

title proper: A chief name of a map

9.5 Fuller Form of Name
CORE ELEMENT

A fuller form of name is a core element when needed to distinguish a person from another person with the same name.

9.5.1 Basic Instructions on Recording Fuller Form of Name
Core instructions are now...

2.3.2 Title Proper

2.3.2.1 Scope

Title proper: A chief name of a manifestation, that is, a title normally used when naming the manifestation. An alternative title is treated as part of the title proper. A title proper does not include:
- parallel title proper (see 2.3.3 RDA)
- other title information (see 2.3.4 RDA)
- parallel other title information (see 2.3.5 RDA).

A file name or data set name is not considered a title proper unless it is the only title appearing in the manifestation.

2.3.2.2 Sources of Information

Take a title proper from the preferred source of information as specified at 2.2.2 RDA–2.2.3 RDA.
If there is no title provided within the manifestation itself, take a title proper from one of the sources specified at 2.2.4 RDA.
Make a note on the source of a title proper, if required (see 2.17.2.3 RDA).

Recording an unstructured description

OPTION

Record a value of Manifestation: title of manifestation.
“An application profile specifies the entities, elements, and vocabulary encoding schemes that are expected in a set of metadata that meets the functions and requirements of an application that uses the metadata.” (Guidance—Application profiles)
# Application profile: LC/PCC

<table>
<thead>
<tr>
<th>Toolkit label</th>
<th>Domain</th>
<th>VES</th>
<th>Universal Requirement</th>
<th>Situational Requirement</th>
<th>Repeatability</th>
<th>Unstructured</th>
<th>Structured</th>
<th>ID</th>
<th>IRI</th>
<th>SES</th>
<th>MARC</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>copyright date</td>
<td>M</td>
<td></td>
<td>Min = 0</td>
<td>RM</td>
<td>Max = n</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td></td>
<td>B: 264 $d; 5XX; 008/07-14</td>
<td>Recommended for rare materials</td>
</tr>
<tr>
<td>media type</td>
<td>M</td>
<td>RDA Media Type</td>
<td>Min = 1</td>
<td></td>
<td>Max = n</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td></td>
<td>B/A: 337</td>
<td></td>
</tr>
<tr>
<td>language of expression</td>
<td>E</td>
<td>MARC Code list for languages</td>
<td>Min = 1</td>
<td></td>
<td>Max = n</td>
<td>Min = 0</td>
<td>Min = 0</td>
<td>Min = 1</td>
<td>Min = 0</td>
<td></td>
<td>B: 041, 008/35-37, 564, 130/240/7XX/8XX $i; A: 377, 1XX/4XX/5XX $i</td>
<td>String encoding scheme has some specific exceptions, which are noted in the WD</td>
</tr>
<tr>
<td>authorized access point for work</td>
<td>W</td>
<td>LC-PCC NACO Authority File</td>
<td>Min = 1</td>
<td></td>
<td>Max = n</td>
<td>Max = 0</td>
<td>Min = 1</td>
<td>Max = 0</td>
<td>Min = 0</td>
<td></td>
<td>RDA Record Syntaxes for Access Point Control</td>
<td>B: 130, 1XX/240, 7XX; A: 1XX</td>
</tr>
</tbody>
</table>

**Key**

**Columns**
- VES: Vocabulary encoding scheme
- Domain: W=Work; E=Expression; M=Manifestation; etc.
- Universal Requirement: mandatory/optional/do not use element for PCC
- Situational Requirement: mandatory if applicable element for PCC
- Unstructured, Structured, ID, IRI: recording methods
- SES: String encoding scheme

**Situational Requirement Codes**
- M=Monographs; S=Serials; RM=Rare materials (books); U=Music, etc.

**Requirement and Recording Methods Codes**
- Minimum = 1: Required
- Minimum = 0: Optional
- Maximum = 0: Do not use

**Repeatability Codes**
- maximum=0: Do Not Repeat
- maximum=n: May Be Repeated
AP and other documentation

• RDA states that there is an element called title proper and presents options on what to record

• Application profile states that you must have a title proper

• Policy statement states that you will apply or not apply specific options within the title proper element

• Other documentation states where and how you will record the title proper in the encoding scheme
Instruction numbers

9.5 Fuller Form of Name

9.5.1 Basic Instructions on Recording Fuller Form of Name

2.3.2 Title Proper

2.3.2.1 Scope
Instruction no. problems

3.6.2 Base Material for Microfilm, Microfiche, Photographic Film, and Motion Picture Film

3.6.2.1 Scope

 bastante texto

3.6.2.2 Sources of Information

 bastante texto

3.6.2.3 Recording Base Material for Microfilm, Microfiche, Photographic Film, and Motion Picture Film

 bastante texto

3.6.2.4 Details of Base Material for Microfilm, Microfiche, Photographic Film, and Motion Picture Film

 bastante texto

Summary of proposed changes

Change #1
- Create RDA 3.22, Optical Disc Data Storage Format
- Renumber current RDA 3.22 to RDA 3.23
- Update references to renumbered instruction

Change #2
- Add Optical discs to the Exceptions in 3.9.1.3
- Create RDA 3.9.4, Production Method for Optical Disc

Change #3
- Add 35 new terms (definitions and cross-references) to RDA Glossary to support the new instructions
Instructions nos. are gone...

• Citation numbers
  ▪ Guidance: Application profiles: RDA Application profile: 03.90.99.20

• Or URLs
Citation numbers

• To share a citation to a specific instruction with a colleague, a student, in a report, etc.

• Shareable
• NOT ordered by hierarchy
• Randomly assigned
• XX.XX.XX.XX pattern
• Searchable
Citation numbers
instance of an entity. These numbers determine if an element is mandatory (minimum equals 1), optional (minimum equals 0), or repeatable (maximum greater than 1).

The specification may include details about how the metadata describing an entity is associated with the metadata describing other instances and other entities.

RDA application profile
An RDA application profile limits the specification to RDA entities, elements, and compatible vocabulary encoding schemes. An RDA application profile specifies:

- The RDA entities that may be included
  - The RDA entities that must be included (minimum = 1)
  - The RDA entities that should be included (minimum = 0)
  - The RDA entities that must not be included (maximum = 0)
  - The RDA entities that must not be repeated (maximum = 1)
  - The RDA entities that may be repeated (maximum > 1)
- The RDA elements that must be used to relate two specified entities. This is usually based on the guidelines in Minimum description of a resource entity.
- The RDA elements that may be used to describe and access an entity
  - The RDA elements that must be used (minimum = 1)
  - The RDA elements that should be used (minimum > 0)
  - The RDA elements that must not be used (maximum = 0)
  - The RDA elements that must not be repeated (maximum > 1)
  - The RDA entities that may be repeated (maximum > 1)
- The RDA recording methods that may be used to record values for a specified element.
  - The RDA recording methods that must be used
  - The RDA recording methods that should be used
- The RDA vocabulary encoding scheme that must be used as a source of values for a structured description or identifier for a specified RDA element.
- The string encoding scheme that must be used to encode the values for a structured description of an element.

Application profiles in RDA Toolkit
RDA Toolkit provides the following ways of specifying an application profile within RDA Toolkit:
Citation numbers

Element may be used to describe or access a member or instance of an entity. These numbers determine if an element equals 1, optional (minimum equals 0), or repeatable (maximum).

The specification may include details about how the metadata describing other instances are handled.

RDA application profile

An RDA application profile limits the specification to RDA entities that must be included, the RDA entities that should be included, and the RDA entities that must not be included.

- The RDA entities that must be included (minimum equals 1)
- The RDA entities that should be included (minimum equals 0)
- The RDA entities that must not be included (maximum equals 1)

Bookmark  Note  Hyperlink  Citation number

Resource Description & Access
Citation numbers

RDA application profile

An RDA application profile limits the specification to RDA elements compatible vocabulary encoding schemes. An RDA application profile provides a more limited and controlled approach to the specification of the elements and concepts under RDA than the full RDA specification.
Citation numbers

An RDA application profile limits the specification to RDA entities and compatible vocabulary encoding schemes. An RDA application...
Sources of information

2.2.1 Application

Apply the instructions at 2.2.2 RDA–2.2.4 RDA when choosing a source of information. Apply for all elements covered in chapter 2 unless the instructions on sources of information for the element specify otherwise.

2.2.2 Preferred Source of Information

2.2.2.1 General Guidelines

Use as the preferred source of information a source forming part of the manifestation itself that is appropriate to:

a) the type of description (see 2.1 RDA)

and

b) the presentation format of the manifestation (see 2.2.2.2 RDA–2.2.4 RDA).

When choosing a preferred source of information, treat as part of the manifestation itself:

a) the storage medium (e.g., paper, tape, film)

and

b) any housing that is an integral part of the manifestation (e.g., dust jacket, binder, slipcase).
Sources of information is now...

Data provenance

**OPTION**

Record a source of information. For general guidance, see Data provenance. *Recording a source of metadata*.

For general guidance on unstructured descriptions, see Recording methods. *Recording*
Data provenance

• Guidance—Data provenance
  ▪ 16.53.31.57
Data provenance

- Recording a note on metadata
- Recording an agent who publishes metadata
- Recording an agent who records metadata
- Recording a content standard used for metadata
- Recording a language of description
- Recording a scope for validity of metadata
- Recording a script of description
- Recording a source of metadata
  - Recording a source of metadata that is a manifestation that is being described
  - Recording a source of metadata that is not a manifestation that is being described
- Recording a timespan for validity of metadata
- Recording a timespan when metadata are published
- Recording a transcription standard used for metadata

Recording a note on metadata
Data provenance

- Recording a source of metadata
  - Recording a source of metadata that is a manifestation that is being described
  - Recording a source of metadata that is not a manifestation that is being described
2.3.2.5 Title in More Than One Form

If:

the source of information for a title proper has a title in more than one form
and
the titles are in the same language and script
then:

choose a title proper on the basis of the sequence, layout, or typography of the titles on the source of information.

If the sequence, layout, and typography do not provide the basis for a clear choice, choose the most comprehensive title.

EXAMPLE

MapEasy’s guidemap to Philadelphia

Two forms of title on the source of information: MapEasy’s guidemap to Philadelphia and Welcome to Philadelphia. First form chosen as title proper based on layout on the source of information.
Examples now

• Four types of examples
  ▪ Basic examples
  ▪ Recording method examples
  ▪ View as relationship (NEW!)
  ▪ View in context (NEW!)
Examples

Recording

Example

Indonesian (language)

Recording method: structured description

VES source: Getty AAT

Source consulted: Ada apa dengan Cinta?

http://id.loc.gov/vocabulary/languages/fre

http://id.loc.gov/vocabulary/languages/rus

Recording method: IRI

Source consulted: Voïna i mir
Examples

Recording methods

Recording a structured description

OPTION

Record a term from a suitable vocabulary encoding scheme.

Example

Chinese (language)

VES source: Getty AAT
Examples

View as relationship

View as Relationship Example

Example

Expression
Piave, Francesco Maria, 1810–1876. La traviata. English has language of expression English

https://viaf.org/viaf/315186343

http://rdaregistry.info/Elements/e/P20006

http://id.loc.gov/vocabulary/languages/eng
Examples
View as relationship

**View as Relationship Example**

**Expression**

*has content type* notated music

https://viaf.org/viaf/182980772

http://rdaregistry.info/Elements/e/P20001

http://rdaregistry.info/termList/RDAContentType/1010
Examples
View in context

View in Context Example

Example

Expression

has authorized access point  Brunhoff, Jean de, 1899–1937. Babar en famille.
for expression  English. Spoken word

has content type  spoken word

has place of capture  New York, New York

has date of capture  October 28, 1940

has language of expression  English

has date of expression  1940

has narrator agent  Luther, Frank, 1905–1980
### Examples

**View in context**

#### View in Context Example

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expression</strong></td>
<td></td>
</tr>
<tr>
<td>has authorized access point</td>
<td>Brunhoff, Jean de, 1899–1937. Babar en famille.</td>
</tr>
<tr>
<td>for expression</td>
<td>English. Spoken word</td>
</tr>
<tr>
<td>has content type</td>
<td>spoken word</td>
</tr>
<tr>
<td>has place of capture</td>
<td>New York, New York</td>
</tr>
<tr>
<td>has date of capture</td>
<td>October 28, 1940</td>
</tr>
<tr>
<td>has language of expression</td>
<td>English</td>
</tr>
<tr>
<td>has date of expression</td>
<td>1940</td>
</tr>
<tr>
<td>has narrator agent</td>
<td>Luther, Frank, 1905–1980</td>
</tr>
</tbody>
</table>
Any questions?