

RDA Workshop ALA Preconference Event “Everything Old Is New Again”

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R | D | A
Resource Description & Access

Outline

1. Recording methods
2. Names, titles, identifiers ... and access points
3. Options

Topic 1: recording methods:

“transcribe”

“record”

“construct”

Current Toolkit - Transcription (1.7.1)

- RDA guidelines (for capitalization, punctuation, diacritical marks, symbols, spacing of initials and acronyms, letters or words intended to be read more than once, abbreviations, inaccuracies + appendices)
- **Alternative**: in-house guidelines or published style manual
- **Alternative**: accept data without modification (description created by another agency, harvesting data, etc.)

Current Toolkit – record in a “form” vs record as they “appear” [transcribe]

Recording Numbers Expressed as Numerals or as Words (1.8.1)

- “Record numerals in the form preferred by the agency creating the data”
- “Record numerals in the form in which they appear on the source of information” [“transcribe”]

Current Toolkit - record values from a list

“Record one or more terms...”

Example: 3.3.1.3. Recording carrier type

“Record a carrier type using one or more of the terms from the following list.”

But for recording values not in the list, record “other” or “unspecified”.

Current Toolkit – record by structuring data

Extent (3.4.1.3)

“Record an extent of the manifestation by giving the number of units and the type of unit”

Current Toolkit - record a value identifying a related entity and record a relationship designator

24.4 Recording Relationships between Works, Expressions, Manifestations, and Items **KBSP**

Record the relationship between a work, expression, manifestation, or item and a related work, expression, manifestation, or item by using one or more of these techniques, as applicable:

- a) identifier for the related work, expression, manifestation, or item (see **24.4.1 RDA**)
- b) authorized access point representing the related work or expression (see **24.4.2 RDA**)

and/or

- c) description of the related work, expression, manifestation, or item (see **24.4.3 RDA**).

Record an appropriate relationship designator to specify the nature of the relationship (see **24.5 RDA**).

Record a numbering of part within a larger work (see **24.6 RDA**) if applicable and if considered important for identification or access.

For guidelines on using the authorized access point representing a related work or related expression to generate a *see also* reference, see appendix E (**E.1.3.3 RDA**).

Current Toolkit - recording a related entity (agent, work, manifestation, etc.)

Identifiers – from “any source”

Authorized access points – “construct”

Descriptions – “structured” or “unstructured”

Current Toolkit - recording a relationship designator

Record an “appropriate relationship designator”

Record a value from a list-- or another term

The BETA TOOLKIT!!

The four recording methods:

- Unstructured description
- Structured description
- Identifier
- IRI

Beta Toolkit Recording Method – Unstructured Description

Kinds of unstructured description include:

- A manifestation statement
- An unstructured note
- A name or title in direct order, as it appears in sources of information
- An uncontrolled term for a concept

Beta Toolkit - transcription

OPTION

Apply the RDA [Guidelines on basic transcription](#). These guidelines require a minimal degree of cataloguer intervention.

(Manifestation Statements)

OPTION

Apply the RDA [Guidelines on normalized transcription](#). These guidelines require additional cataloguer judgement.

- [Language and script](#)
- [Diacritical marks](#)
- [Capitalization](#)
- [Punctuation](#)
- [Punctuation of initials and acronyms](#)
 - [Names of corporate bodies](#)
- [Spacing of initials and acronyms](#)
 - [Names of persons or families](#)
 - [Names of corporate bodies](#)
- [Letters or words intended to be read more than once](#)
- [Abbreviations and symbols](#)
- [Numbers](#)

OPTION

Apply any transcription guidelines.

OPTION

Record the guidelines or scheme that is used for a transcription. For general guidance, see Data provenance. [Recording a transcription standard used for metadata](#).

Beta Toolkit Recording Method – Structured Description

Kinds of structured description include:

- An access point
- A structured note
- A name or title taken from an authority control system
- A term for a concept taken from a controlled vocabulary
- A value associated with a structured data type, including numbers, dates, and times

Beta Toolkit Recording Method – Structured Description – VES AND SES

VES – vocabulary encoding scheme

SES – string encoding scheme

Beta Toolkit

Resources > Vocabulary Encoding Schemes > RDA Carrier Type

Vocabulary Encoding Schemes: RDA Carrier Type

object

<http://rdaregistry.info/termList/RDACarrierType/1059>

(Notation 1059)

A carrier type that consists of a three-dimensional artifact, a replica of an artifact, or a naturally-occurring object.

online resource

<http://rdaregistry.info/termList/RDACarrierType/1018>

(Notation 1018)

A carrier type that consists of a digital resource accessed by means of hardware and software connections to a communications network.

string encoding scheme

A set of string values and an associated set of rules that describe a mapping between that set of strings and a value of an element.

CONDITION

A work is a *single work*.

A work is created by one agent.

OPTION

Record a value that includes, in this order:

1. a value of Agent: [authorized access point for agent](#)
2. a value of Work: [access point for work](#) that is based on Work: [preferred title of work](#)

Beta Toolkit Recording Method – Identifier

Kinds of identifier include:

- An identifier assigned by an independent, external agent
- An identifier assigned by a local agent
- A notation for a concept taken from a controlled vocabulary

Beta Toolkit Recording Method – IRI

An IRI (Internationalized Resource Identifier) is an identifier based on Semantic Web technologies that is used as the referent of an entity or controlled term in linked open data using Resource Description Framework.

Beta Toolkit – recording a relationship element

Entities > Work > adaptation of work

adaptation of work

Definition and Scope

A work that is modified for a purpose, use, or medium other than that for which it was originally intended.

This element applies to changes in form or to works completely rewritten in the same form.

 Element Reference

IRI

<http://rdaregistry.info/Elements/w/P10142>

Structured description:
adaptation of work

Identifier:
P10142

IRI:
<http://rdaregistry.info/Elements/w/P10142>

Topic 2: Names, titles, identifiers ... and access points

Attributes (including “Name”) and Access points

- Section 3: Recording Attributes of Agents
 - + 8: General Guidelines on Recording Attributes of Agents
 - 9: Identifying Persons
 - 9.0 Purpose and Scope
 - + 9.1 General Guidelines on Identifying Persons
 - + 9.2 Name of Person
 - + 9.3 Date Associated with Person
 - + 9.4 Title of Person
 - + 9.5 Fuller Form of Name
 - + 9.6 Other Designation Associated with Person
 - + 9.7 Gender
 - + 9.8 Place of Birth
 - + 9.9 Place of Death
 - + 9.10 Country Associated with Person
 - + 9.11 Place of Residence, Etc.
 - + 9.12 Address of Person
 - + 9.13 Affiliation
 - + 9.14 Language of Person
 - + 9.15 Field of Activity of Person
 - + 9.16 Profession or Occupation
 - + 9.17 Biographical Information
 - + 9.18 Identifier for Person
 - + 9.19 Constructing Access Points to Represent Persons

- 9.19 Constructing Access Points to Represent Persons
 - 9.19.1 Authorized Access Point Representing a Person
 - 9.19.1.1 General Guidelines on Constructing Authorized Access Points to Represent Persons
 - + 9.19.1.2 Title or Other Designation Associated with the Person
 - 9.19.1.3 Date of Birth and/or Death
 - 9.19.1.4 Fuller Form of Name
 - 9.19.1.5 Period of Activity of Person
 - 9.19.1.6 Profession or Occupation
 - 9.19.1.7 Other Term of Rank, Honour, or Office
 - 9.19.1.8 Other Designation
 - 9.19.2 Variant Access Point Representing a Person
 - 9.19.2.1 General Guidelines on Constructing Variant Access Points to Represent Persons

OTHER IDENTIFYING ELEMENTS

9.3 **Date Associated with Person** 2013/07 SKL

CORE ELEMENT

Date of birth and date of death are core elements. Period of activity of person is a core element only when needed to distinguish a person from another person with the same name.

9.4 **Title of Person** 2013/07

CORE ELEMENT

Title of person is a core element when it is a word or phrase indicative of royalty, nobility, or ecclesiastical rank or office, or a term of address for a person of religious vocation. Any other term indicative of rank, honour, or office is a core element when needed to distinguish a person from another person with the same name.

9.6 **Other Designation Associated with Person** 2014/04

CORE ELEMENT

Other designation associated with person is a core element for a Christian saint, a spirit, a person named in a sacred scripture or an apocryphal book, a fictitious or legendary person, or a real non-human entity. For other persons, an other designation associated with person is a core element when needed to distinguish a person from another person with the same name.

Current Toolkit - Preferred Name of Person

-- includes instructions for preparing it for use in an access point (such as for inverted order for surnames)

EXAMPLE

Bernhardt, Sarah

Byatt, A. S.

Ching, Francis K. W.

appellation of person

Definition and Scope

A nomen that is used within a given scheme or context to refer to a person.

Beta Toolkit

Recording

Record this element as a value of a [Nomen entity](#).

Recording an unstructured description

Record an unstructured description as Person: name of person.

For general guidance on unstructured descriptions, see Recording methods. [Recording an unstructured description](#).

Recording a structured description

Record a structured description as Person: access point for person.

For general guidance on structured descriptions, see Recording methods. [Recording a structured description](#).

Recording an identifier

Record an identifier as Person: identifier for person.

For general guidance on identifiers, see Recording methods. [Recording an identifier](#).



Beta Toolkit

Entities > Person > name of person

name of person

Definition and Scope

An appellation of person in natural language and phrasing used in common discourse.



 Element Reference

Prerecording

A name of person may be:

- a real name
- a pseudonym
- a term of rank of nobility
- a nickname
- initials of a name
- an assigned name

A name may be categorized as:

- Person: [preferred name of person](#) 
- Person: [variant name of person](#) 

A name not chosen as a preferred name may be recorded as a variant name.

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preferred name of person


Definition and Scope

A name of person that is selected for preference in a specific application or context.

 Element Reference


Prerecording












Recording

Record this element as a value of a [Nomen](#) entity .

Recording an unstructured description

OPTION

Record a value of [Person: name of person](#) .

- [Persons with more than one name](#) 
 - [Predominant name of person](#) 
 - [Contracted and expanded names of person](#) 
- [Names of person in more than one language](#) 
 - [Greek, Latin, and other names of person](#) 
 - [Indic names of person](#) 
 - [Roman names of person](#) 
 - [Names of person consisting of a given name or a word or phrase](#) 
- [Names of person in a non-preferred script](#) 
- [Names of person in more than one spelling](#) 
- [Data provenance](#) 

Beta Toolkit

Entities > Person > authorized access point for person

authorized access point for person


Definition and Scope

An access point for person that is selected for preference in a specific vocabulary encoding scheme.


Beta Toolkit

Recording a structured description

OPTION

Record a value that is selected within a vocabulary encoding scheme as an authorized form of Person: [access point for person](#) .

OPTION

Record a value of Person: [access point for person](#) .

OPTION

Construct an access point by applying a string encoding scheme to the values of one or more other elements.

Beta Toolkit

Access points are structured descriptions – includes surname order for Name of person when used in an access point

- Basis of authorized access point for person →
 - Persons with more than one preferred name →
 - Preferred names of person that include a surname →
 - General guidelines on recording names that include a surname →
 - Preferred names of person that include a term of rank, honour, or office or a term of address →
 - Preferred names of person that include a surname represented by an initial →
 - Preferred names of person that treat part of the name as a surname →
 - Preferred names of person that include words indicating relationship following surnames →
 - Preferred names of person that include a compound surname →
 - Preferred names of person that include a surname with a separately written prefix →
 - Prefixes hyphenated or combined with surnames →
 - Names of person that include a surname of a former member of a royal house →

- Preferred names of person that include a term of rank of nobility →
 - Term of rank in the United Kingdom peerage that includes a territorial designation →
 - Judges of the Scottish Court of Session with a law term of rank beginning with Lord →
 - Disclaimed and newly acquired terms of rank →
- Preferred names of person that include neither a surname nor a term of rank of nobility →
- Preferred names of person that includes a patronymic →
- Preferred names of person that consist of initials, or of separate letters, or numerals →
- Preferred names of person that consist of a phrase →
 - Characterizing word or phrase →
 - Phrase naming another work by a person →
- Additional elements and designations in authorized access point for person →
- Data provenance →

Additions to the access point



appellation of manifestation

Definition and Scope

A nomen used within a given scheme or context to refer to a manifestation.

Beta Toolkit

Recording

Record this element as a value of a [Nomen entity](#).

Recording an unstructured description

Record an unstructured description as Manifestation: [title of manifestation](#).

For general guidance on unstructured descriptions, see Recording methods. [Recording an unstructured description](#).

Recording a structured description

Record a structured description as Manifestation: [access point for manifestation](#).

For general guidance on structured descriptions, see Recording methods. [Recording a structured description](#).

Recording an identifier

Record an identifier as Manifestation: [identifier for manifestation](#).

For general guidance on identifiers, see Recording methods. [Recording an identifier](#)



title of manifestation

Definition and Scope

An appellation of manifestation in natural language and phrasing used in common discourse.

 Element Reference

Prerecording

A manifestation may have no title, or one or more titles that may appear:

- in a Manifestation: [recording source](#) of a manifestation being described
- elsewhere in a manifestation being described
- in reference sources
- in a description of the manifestation (e.g., a cataloguer's translation of the title)

A title may consist of a characterizing word or phrase.

A title may be categorized as:

- Manifestation: [title proper](#)
- Manifestation: [parallel title proper](#)
- Manifestation: [other title information](#)
- Manifestation: [parallel other title information](#)
- Manifestation: [variant title of manifestation](#)
- Manifestation: [abbreviated title](#)
- Manifestation: [title of series](#)
- Manifestation: [parallel title of series](#)

A title not chosen as a title proper may be recorded as a variant title.

Beta Toolkit

Unstructured description for **Title of manifestation**

This element covers all
titles of manifestation.

Entities > Manifestation > title proper

title proper

Definition and Scope

A title of manifestation that is selected for preference in a specific application or context.

An alternative title is treated as part of a title proper.

Beta Toolkit

Recording an unstructured description

OPTION

Record a value of Manifestation: [title of manifestation](#).

OPTION

Record a Manifestation: [note on manifestation](#) on the source or basis for a value of a title proper.

- [More than one title of manifestation](#)
 - [Titles proper of manifestations of parts and iterations](#)
- [Titles of manifestation in more than one language or script](#)
- [Introductory words in titles proper](#)
- [Titles proper of aggregates](#)
- [Devised titles proper](#)
- [Alternative titles proper](#)
- [Titles proper of facsimiles and reproductions](#)
- [Titles proper including music information](#)
- [Change in a title proper](#)
- [Data provenance](#)

Data provenance

OPTION

Record a source of information. For general guidance, see [Data provenance](#). [Recording a source of metadata](#).

Topic 3: Options

Current Toolkit

Options have always been part of the Toolkit.

Choice is needed for different communities and applications.

Current Toolkit – OPTIONS

0.8 Alternatives and Options D-A-CH

RDA includes a number of guidelines and instructions that are labelled as alternatives or as options. Alternative guidelines and instructions provide an alternative to what is specified in the immediately preceding guideline or instruction.

Optional instructions provide for:

either

- a) the *optional addition* of data that supplement what is called for in the immediately preceding instruction

or

- b) the *optional omission* of specific data called for in the immediately preceding instruction.

The agency responsible for creating the data may choose:

- a) to establish policies and guidelines on the application of alternatives and options

or

- b) to leave decisions on the use of alternatives and options to the judgment of the cataloguer or the individual creating the data.

0.9 Exceptions LC-PCC PS

RDA includes a number of instructions that are labelled as exceptions.

An exception is an instruction that takes precedence over the immediately preceding instruction and applies to a specific type of resource, condition, etc.

Current Toolkit Choice – access point components

11.4 Date Associated with Corporate Body 2013/07 SKL

CORE ELEMENT

...

11.4.1.3 General Guidelines LC-PCC PS 2014/04

...

Record a date of corporate body as a separate element, as a part of an access point, **or** as both. For additional instructions on recording dates as parts of authorized access points, see **11.13.1.5 RDA**.

Current Toolkit Choice – recording methods

29.4 Recording Relationships between Agents **KBSP**

Record the relationship between an agent and a related person, family, or corporate body by using one or both of these techniques:

- a) identifier (see **29.4.1 RDA**)
- and/or*
- b) authorized access point (see **29.4.2 RDA**).

Current Toolkit Choice – relationship granularity

I.1 General Guidelines on Using Relationship Designators LC-PCC PS

SKL

...

Use a relationship designator at the level of specificity that is considered appropriate for the purposes of the agency creating the data. For example, the relationship between a screenplay and the screenwriter responsible for the work can be recorded using either the specific relationship designator *screenwriter* or the more general relationship designator *author*.

If none of the terms listed in this appendix is appropriate or sufficiently specific, use another concise term to indicate the nature of the relationship.

Current Toolkit Choice – embedded options

3.1.4 Manifestations Consisting of More Than One Carrier Type

LC-PCC PS MLA D-A-CH LAC/BAC-BAnQ

When preparing a comprehensive description for a manifestation consisting of more than one carrier type, apply the method that is appropriate to the nature of the manifestation and the purpose of the description:

a) record only carrier type and extent of each carrier (see **3.1.4.1 RDA**)

or

b) record carrier type, extent, and other characteristics of each carrier (see **3.1.4.2 RDA**)

or

c) record the predominant carrier type and extent in general terms (see **3.1.4.3 RDA**).

Record additional characteristics of particular carriers if considered important for identification or selection (see **3.6 RDA–3.20 RDA**).

Current Toolkit Choice – explicit options

3.1.4.3 Recording Predominant Carrier Type and Extent in General Terms 2014/04

For a manifestation consisting of many different types of carriers, record:

- a) the predominant carrier type (**3.3 RDA**)
- and*
- b) the extent of the manifestation as a whole, describing the units as *various pieces* (see **3.4.1.5 RDA**).

Optional Omission LC-PCC PS NLA PS BL PS D-A-CH LAC/BAC-BAnQ KBSP

If the number of units cannot be readily ascertained or approximated, omit the number.

Optional Addition NLA PS BL PS D-A-CH LAC/BAC-BAnQ KBSP

If the carriers are in a container, name the container and record its dimensions (see **3.5.1.5 RDA**).

Current Toolkit Choice – alternative instructions

2.2.2.3 Manifestations Consisting of Moving Images 2013/07 D-A-CH

If the manifestation consists of moving images (e.g., a film reel, a videodisc, a video game, an MPEG video file), use the title frame or frames, or title screen or screens, as the preferred source of information. If the title frames or title screens only list the titles of the individual contents and another source forming part of the manifestation has a formally-presented collective title, use as the preferred source of information the first applicable source with a formally-presented collective title.

Alternative NLA PS BL PS D-A-CH LAC/BAC-BAnQ KBSP

Use a label with a title that is permanently printed on or affixed to the manifestation in preference to the title frame or frames, or title screen or screens. This alternative does not apply to labels on accompanying textual material or a container.

Beta Toolkit

OPTIONS IN THE BETA TOOLKIT

ELEMENTS ARE OPTIONS (except those required by “coherent” and “minimum” descriptions)

An “effective description” is based upon requirements of a cataloguing agent or local application.

Beta Toolkit

OPTIONS IN THE BETA TOOLKIT

RECORDING METHODS ARE OPTIONS

- Unstructured description
- Structured description
- Identifier
- IRI

(opens the door for elements like “Access point for item”)

Beta Toolkit – all instructions are presented as options

Statement naming more than one agent


OPTION

Record a statement of responsibility naming more than one agent as a single statement whether those agents perform the same function or different functions.

CONDITION

A single statement of responsibility names more than three agents performing the same function (or with the same degree of responsibility).

OPTION

Omit any but the first of each group of such agents. Indicate the omission by summarizing what has been omitted in a language and script preferred by an agent who creates the metadata. Indicate that the summary was taken from a source outside the manifestation itself (see [Data provenance. Recording a source of metadata](#) ,).

from
**Manifestation:
Statement of
responsibility**

Thank you!

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