WORKING IN A MULTI-STANDARDS METADATA ENVIRONMENT: FRBR, AACR2 & RDA, OCLC

Guest Lecture for LIS5703, Dr. Michelle Kazmer, FSU College of Communication and Information, March 6, 2014

Objectives of this class:

To gain understanding of:

FRBR as a entity relationship model

To gain understanding of the differences between:

- Content, Display, and Encoding Standards
- AACR2 and RDA

To become aware of OCLC policies that will create:

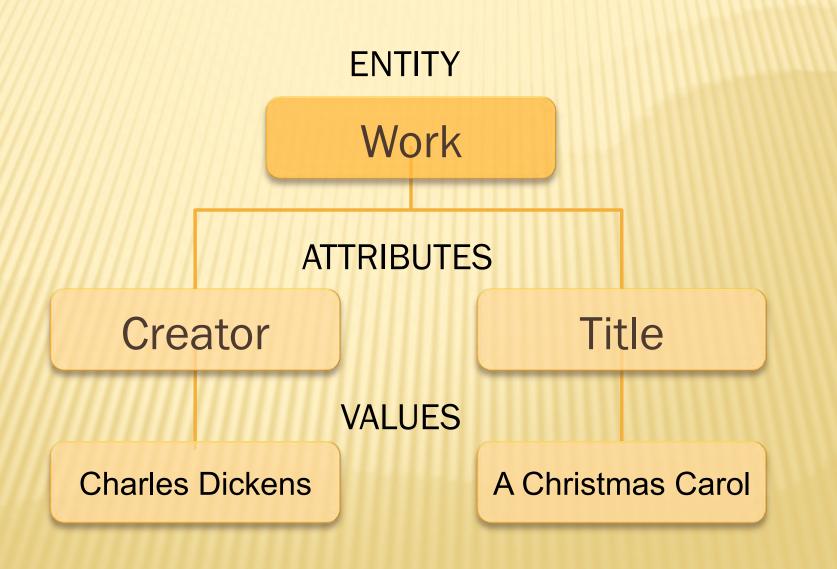
AACR2-RDA hybrid records

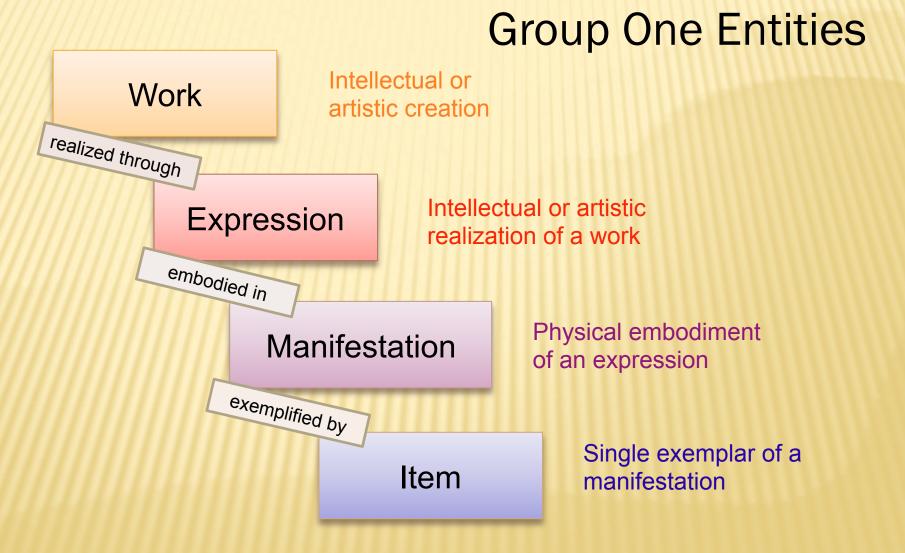
FRBR

Entity-Relationship Model

Functional Requirements for Bibliographic Records *user* tasks:

- * Find
- Identify
- × Select
- × Obtain





Group Two Entities

Person

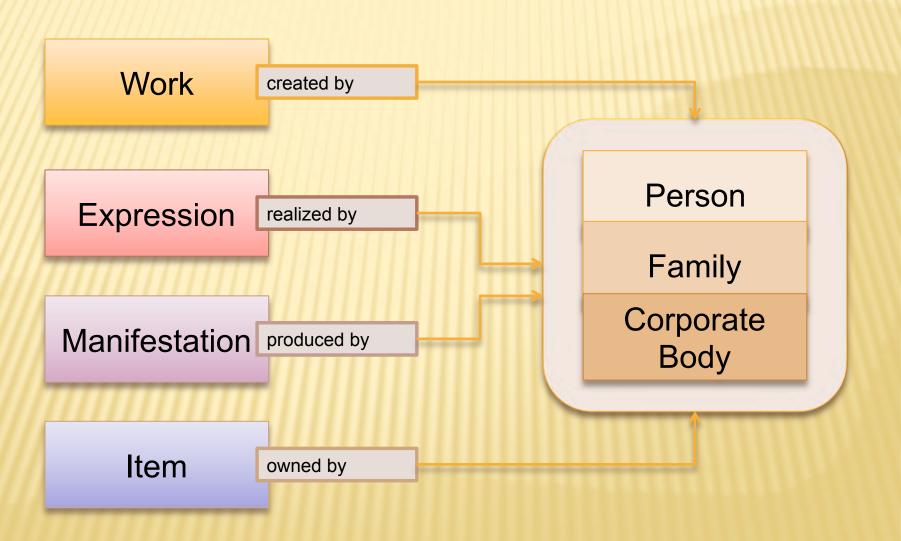
an individual

Family

A group of related persons

Corporate Body

an organization or group of individuals and/or organizations



Group Three Entities

Concept

an abstract notion or idea

Object

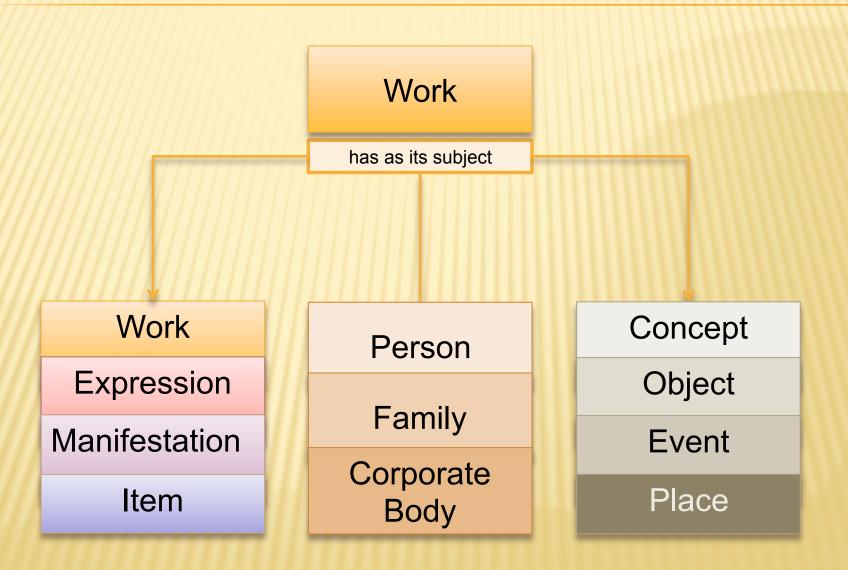
a material thing

Event

an action or occurrence

Place

a location



MULTI-STANDARDS METADATA ENVIRONMENT Group 1 entities

Type a Form _ LitF d

Lang eng Ctry enk Date 1703

100 \$a Shakespeare, William, \$d 1564-1616.

240 \$a Hamlet.

245 \$a The tragedy of Hamlet, Prince of Denmark: \$b as it is now acted by Her Majesties servants / \$c by William Shakespeare.

260 \$a London: \$b Printed for Rich. Wellington ... and E. Rumball ..., \$c 1703.

300 \$a [4], 82 p.; \$c 22 cm.

590 \$a Signatures: [A]² B-L⁴ M² (last leaf wanting in LC copy).

650 \$a Hamlet (Legendary character)

655 \$a Tragedies. \$2 gsafd

100 \$a Shakespeare, William, \$d 1564-1616.

240 \$a Hamlet.

Type a LitFd Langeng

245 \$a The tragedy of Hamlet, Prince of Denmark : 655 Tragedies. \$2 gsafd

Form _ Ctry enk Date 1703

245 \$a The tragedy of Hamlet, Prince of Denmark: \$b as it is now acted by Her Majesties servants / \$c by William Shakespeare.

260 \$a London: \$b Printed for Rich. Wellington ... and E. Rumball ..., \$c 1703.

300\$a [4], 82 p.; \$c 22 cm.

590 \$a Signatures: [A]² B-L⁴ M² (last leaf wanting in LC copy).

Group 2 entities

100 \$a Shakespeare, William, \$d 1564-1616.

Group 3 entities

650 \$Hamlet (Legendary character).

Content, Display, & Encoding Standards

Content

Which bibliographic elements should be included in the description?



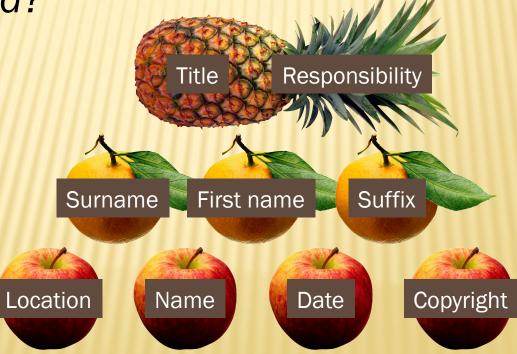




Display

How should those bibliographic elements be

displayed?



Encoding

Which metadata schema should contain the

descriptive data?

Content

Which bibliographic elements should be included

in the description?







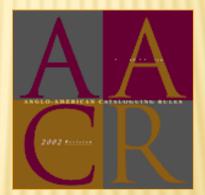


Display

How should those bibliographic elements be

displayed?







International Standard Bibliographic Description (ISBD)



Encoding

Which metadata schema should contain the

descriptive data?













AACR2 and RDA

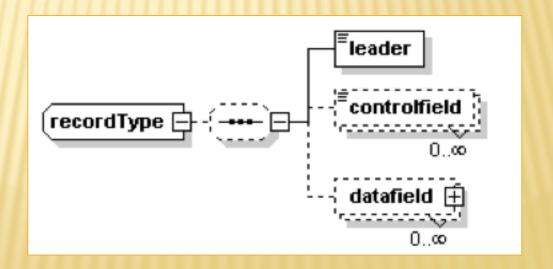
AACR2



HEADING [Uniform Title] Title proper / Responsibility. - Edition. - PubLocation: PubName, Pub date. -- # p.: ill.; # cm - Notes - ISBN. I. TITLE 1. Subject 2. Subject

RDA





AACR2 vs. RDA

How are AACR2 and RDA the same?

- Both establish a standard for bibliographic description so that information resources can be found, identified, selected, and accessed
- × RDA built of the 'bricks' of AACR2
 - Dismantled, reconstructed, remodeled

AACR2 vs. RDA

How is RDA different than AACR2?

- Based on FRBR, a conceptual entityrelationship model
- Designed for a digital environment: RDA Toolkit
- "Take what you see, accept what you get."*
 - Less abbreviations and truncation, less stringent capitalization rules

^{*} Dr. Barbara B. Tillett, Chief, Policy and Standards Division, Library of Congress

AACR2 vs. RDA

- RDA is a content standard, but not a display standard like AACR2
- × RDA is not an encoding standard, like MARC which was based on ISBD and AACR2
- × RDA focuses on local user needs:
 - Agency preparing the description chooses the language, script, numeric system

AACR2 vs. RDA

WORK—Name WORK—Title

ACCESS—Name ACCESS—Subject ACCESS—Title

HEADING

[Uniform Title]

Title proper / Responsibility.

- Edition. - PubLocation:

PubName, Pub date. -- # p.:

ill.; # cm - Notes - ISBN.

1. Subject 2. Subject I. TITLE

EXPRESSION—Edition

MANIFESTATION—Title proper

MANIFESTATION—Responsibility

MANIFESTATION—Edition

MANIFESTATION—PubLocation

MANIFESTATION—PubName

MANIFESTATION—PubDate

MANIFESTATION—Extent

MANIFESTATION—Physical details

MANIFESTATION—Dimensions

MANIFESTATION—Notes

MANIFESTATION—ISBN

AACR2 Part 1 is based on ISBD Areas of Description

- Title and statement of responsibility
- Edition area
- 3. Material specific details
- 4. Publication, etc.
- Physical description
- 6. Series
- 7. Notes
- Standard numbers and terms of availability

Part 2 covers access points

RDA is based FRBR entities

Group 1 Entities:
Work, Expression,
Manifestation, Item

Group 2 Entities:
Persons, Corporate Bodies,
Families

Group 3 Entities: Concept, Object, Event, Place

Author: Dickens, Charles, 1812-1870.

Uniform title: Christmas carol

Title: A Christmas carol : in prose; being a ghost story of Christmas

Publisher: London: Chapman & Hall, 1843.

Physical description: 166 p., [4] leaves of plates: ill. (some col.); 17 cm.

Language: English

Entity: Person; *Role*: Creator; *Value*: Dickens, Charles, 1812-1870

Entity: Work; *Element:* Preferred title;

Value: Christmas carol

Entity: Work; *Element:* Title; *Value:* A Christmas carol: in prose; being a ghost story of Christmas

Entity: Expression; *Element:* Language;

Value: English

Entity: Manifestation; *Element:*Publisher name; *Value:* Chapman &

Hall

Entity: Manifestation; *Element:* Extent;

Value: 166 pages, 4 unnumbered

leaves of plates

AACR2 vs. RDA

Terminology

Heading = Authorized Access Point

Author, Composer, etc. = Creator

Main Entry = Preferred title; Creator's Authorized Access Point

Uniform Title = Preferred Title & Qualifiers or Generic Collective Title

AACR2 vs. RDA

Terminology

See reference = Variant access point

See also reference = Authorized access point for related entity

Physical description = Carrier description

Chief source = Preferred sources

GMD = Content type + Media type + Carrier type

AACR2 Record in Mango

Title: The Nature and future of the catalog : proceedings of the ALA's Information Science and

Automation Division's 1975 and 1977 institutes on the catalog

edited by Maurice J. Freedman and S. Michael Malinconico.

Published: Phoenix, AZ : Oryx Press, 1979.

Description: xvi, 317 p. : ill. ; 24 cm.

Notes: "A Neal-Schuman professional book."

Includes bibliographical references and index.

ISBN: 0912700084:

Subjects, general:

Cataloging -- Congresses

Libraries -- Automation -- Congresses

Library catalogs -- Congresses

Subjects, medical:

Cataloging -- congresses

Catalogs, Library -- congresses

Other author(s),etc:

American Library Association Information Science and Automation Division

Freedman, Maurice J.

Malinconico, S. Michael

Format: Book



RDA Record in Mango

Title: Conversations with catalogers in the 21st century

Elaine R. Sanchez, editor; foreword by Michael Gorman.

Santa Barbara, California | Libraries Unlimited, [2011], @2011. Published:

Description: xii, 283 pages : illustrations ; 24 cm.

Libraries Unlimited library management collection Series note:

Series: Libraries Unlimited library management collection.

Alternate title: Conversations with catalogers in the twenty-first century

Notes: Includes bibliographical references and index.

"Authored by cataloging librarians, educators, and information system experts, this book of

essays addresses ideas and methods for tackling the modern challenges of cataloging and Summary:

metadata practices" -- Provided by publisher.

ISBN: 1598847023 (pbk. : acid-free paper)

9781598847024 (pbk. : acid-free paper)

Subjects, general:

Cataloging -- History -- 21st century

Other

author(s),etc:

Format: Book

Sanchez, Elaine



Title and Statement of responsibility 2. Edition statement 3. Material specific designation	Personal names		Corporate names	Meeting names	
4. Publication, etc. 5. Physical description	Series titles		Uniform titles		
6. Series statement		65			
7. Notes	Topical	Geographic	Names	Titles	
8. Numbers and terms of availability		Su	bje	cts.	

245 \$a [Title] / \$c [Statement of responsibility]	700	710 [01	00] 017	111 [Meeting name 711 [Meeting name	
250 \$a [Edition statement]	0 [Name]	a pola	[Corporate name		
245 \$h [Material specific designation]	ne]	diam	te name	name]	
260 \$a [Publication place]: \$b [Publisher name], \$c [Publication date].	Serie: 830 [Se	title	/30	130 [U	
300 \$a [Extent]: \$b [Illustrative matter]; \$c [Dimensions].	Series title] 830 [Series title]	ame/Series	[Uniform title] [Uniform title]		
490 \$a [Series statement]	Tit	S	e] e]		
5xx \$a [Notes]. 546 \$a [Language note]. 504 \$a [Bibliography note]. 505 \$a [Contents note].	650 [Topical	651 [Geographic	600 [Name]	630 [Title]	
0xx \$a [Numbers and coded data] 020 \$a [ISBN]	cal]	aphic]	ne]	e]	

Call number: Z693.A15 N39

Publication: Phoenix, AZ: Oryx Press,

1979.

Description: xvi, 317 p.: ill.; 24 cm. Notes: Includes bibliographical

references and index.

Subject: Cataloging--Congresses.

Subject: Library catalogs--

Congresses.

Added name: Freedman, Maurice J.

Author, etc.: Daly, Richard R.

Title: The future crisis in the card catalog: how libraries are preparing for it / by Richard R. Daly

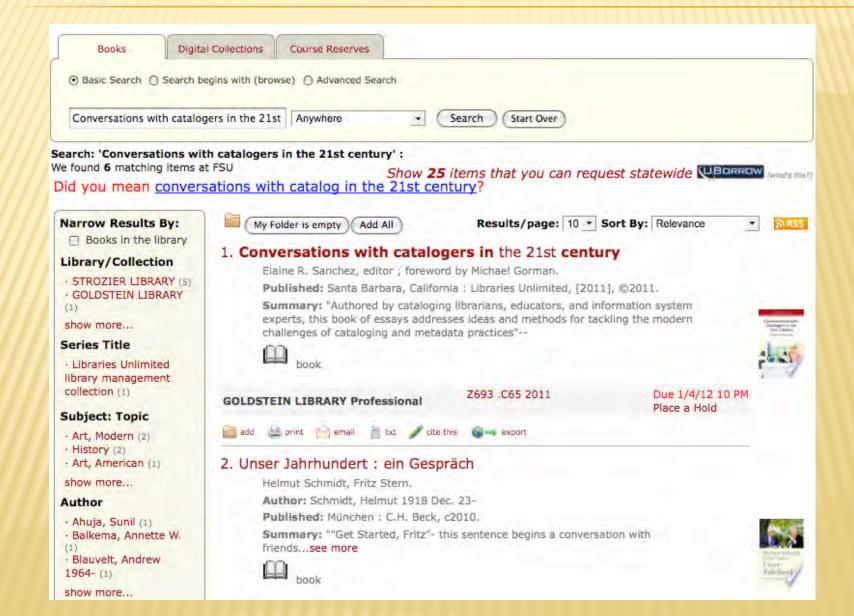
Published: Media, PA: Information Associates, c1979.

Description: 12 p.; 22 cm.

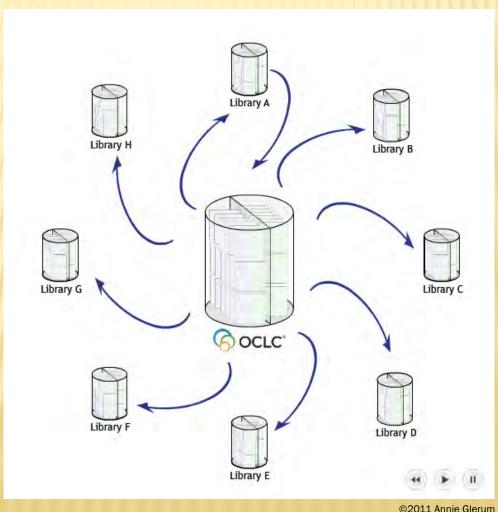
Subjects, general: Card catalogs.

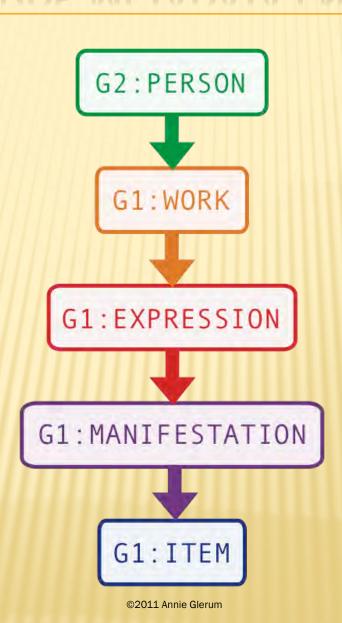
Format: BK

Material type: <Book>



Boxed Data





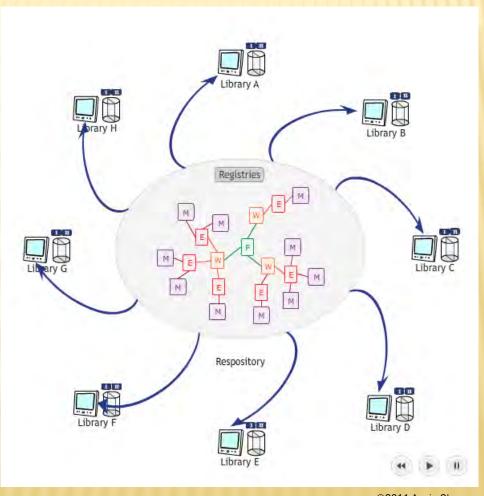
```
<frbr:Person>
          <rdaElement:idPerson> uri= "[VALUE]" />
          <rdaElement:PreferredName>[VALUE]
           </rdaElement:PreferredName>
          <rdaElement: AssociatedDate>
                <rdaSubelement=birthdate>[VALUE]
                 </rdaSubelement=birthdate>
          </rdaElement:AssociatedDate>
     </frbr:Person>
<frbr:Work>
     <rdaElement:idWork> uri= "[VALUE]" />
     <rdaElement:PreferredTitle>(VALUE)
      </rdaElement:PreferredTitle>
     <rdaElement:WorkCreator>
          <role:author>
               <rdaElement:idPerson> uri= "[VALUE]" />
           «/role:author»
     </rdaElement:WorkCreator>
</frbr:Work
   <frbr:Expression>
        <rdaElement:idExpression> uri= "[VALUE]" /> •
         link:idWork> uri= "[VALUE]" />
        <rdaElement:Language>[VALUE]
         </rdaElement:Language>
   </frbr:Expression>
  <frbr:Manifestation>
       <rdaElement:idManifestation> uri= "[VALUE]" />
        k:idExpression> uri= "[VALUE]" />
       <rdaElement:TitleProper>(VALUE)
        </rdaElement:TitleProper
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        </rdaElement:PublicationDate>
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        </rdaElement:CarrierType>
  </frbr:Manifestation>
    <frbr: Item>
          <rdaElement:idItem> uri= "[VALUE]" />
           k:idManifestation> uri= "[VALUE]" />
          <rdaElement:Location>[VALUE]
           </rdaElement:Location>
          <rdaElement:Classification>(VALUE)
           </rdaElement:Classification>
     </frbr:Item>
```

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```
sfrbr Person>
           <rdaElement:idPerson> uri= "[VALUE]" />
          <rdaElement:PreferredName>[VALUE]
            </rdaElement:PreferredName>
           <rdaElement: AssociatedDate>
                 <rdaSubelement=birthdate>[VALUE]
                  </rdaSubelement=birthdate>
           </rdaElement:AssociatedDate>
     </frbr:Person>
sfrbr:Work>
     <rdaElement:idWork> uri= "[VALUE]" /=
     <rdaElement:PreferredTitle>(VALUE)
      </rdaElement:PreferredTitle>
     <rdaElement:WorkCreator>
           srole: authors
                <rdaElement.idPerson> uri= "[VALUE]" />
            s/role authors
     </rdaElement:WorkCreator>
</fre></fre></fre>
```

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Linked Data



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BIBFRAME.ORG New Bibliographic Framework

Overview

Vocabulary

Demos

Tools

Contribute

Home

BIBFRAME Model Overview



The Library of Congress has launched the Bibliographic Framework Transition Initiative to better accommodate future needs of the library community. A major focus of the initiative will be to determine a transition path for the MARC 21 exchange format to more Web based, Linked Data standards. Zepheira and The Library of Congress are working together to develop a Linked Data model, vocabulary and enabling tools / services for supporting this Initiative.

BIBFRAME.ORG provides an overview of this effort. This site offers:

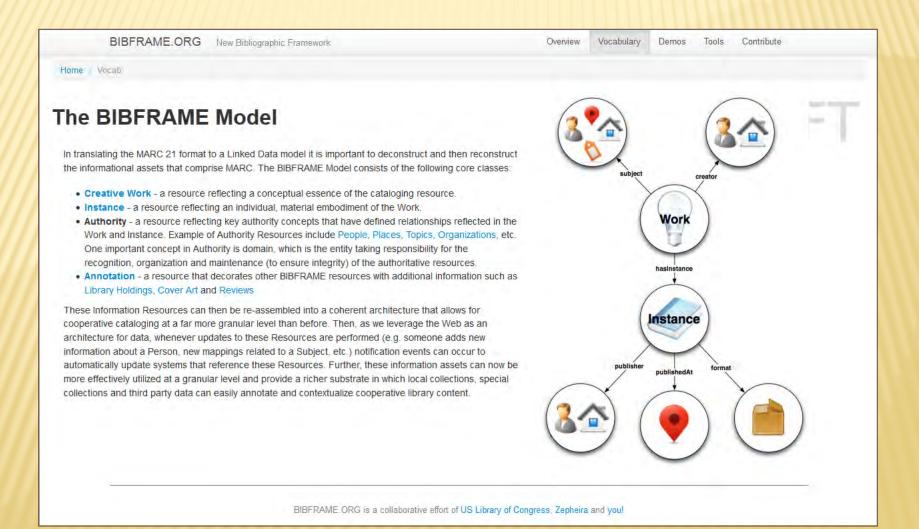
- A demonstration area where the model is being tested and displayed using different test suites of data
- View of the BIBFRAME vocabulary along with supporting formal specifications
- Educational resource on how the BIBFRAME vocabulary relates to MARC21 fields and subfields
- · Code and supporting services.

Additional background on this initiative can be found here:

- LC's Bibliographic Framework Initiative: An Update (November 29, 2012)
- Bibliographic Framework as a Web of Data: Linked Data Model and Supporting Services (November 21, 2012)
- Bibliographic Framework Initiative Approach for MARC Data as Linked Data (September 2012)
- Webcast of New Bibliographic Framework: Update with Eric Miller (July 16, 2012)
- The Library of Congress Announces Modeling Initiative (May 22, 2012)
- Transforming our Bibliographic Framework: A Statement from the Library of Congress (May 13, 2011)
- . A Bibliographic Framework for the Digital Age (October 31, 2011)

BIBFRAME@LISTSERV.LOC.GOV

BIBFRAME.ORG is a collaborative effort of US Library of Congress, Zepheira and you!



OCLC Hybrid Records

OCLC Policy as of March 31, 2013

Original Cataloging

- Records may be entered in RDA, AACR2, or any other recognized cataloging code
- Use name access points from the LC/NACO authority file
 - Okay if the description follows AACR2 rules but the names follow RDA instructions

OCLC Policy as of March 31, 2013

Copy Cataloging

- Not required to upgrade AACR2 records to RDA
- Do not change RDA master records to AACR2

Upgrading/Enhancing Existing Records

- Optional to upgrade minimal and full records to RDA, but only with the "piece in hand"
- Okay to enrich the record without upgrading to RDA

OCLC Policy as of March 31, 2013 Hybrid Records

Okay to add RDA elements to non-RDA records:

- Relationship designators to access points
- Complete statements of responsibility in place of the first author only and "[et al.]"
- × 336/337/338 fields
- Spelling out abbreviations (non-transcribed only)

OCLC Policy as of March 31, 2013

Hybrid Records

OCLC will be globally changing AACR2 records

- Adding relationship designators
- × Adding 336/337/338 fields
- Spelling out abbreviations (non-transcribed only) in 255, 300, 500, 504, and other fields
- Converting Latin abbreviations (n.l., s.n., s.d.) to English in 245, 260, and other fields

OCLC Policy as of March 31, 2013 Hybrid Records

Access points (i.e. Headings) will be changed to RDA practices

- Abbreviations such as "Dept." will be spelled out
- Dates, use "approximately" instead of "ca."
- Headings for the Bible and the Koran will conform to RDA instructions

AACR2

Desc a

O40 __ KNM \$c KNM \$d OCLCQ

245 00 Oriental ceramics, the world's great collections / \$c British Museum ... [et al.].

250 __ Standard ed.

260 __ New York : \$b Kodansha International, \$c [ca. 1980-1982]

300 __ 11 v. : \$b ill. (some col.); \$c 37

cm.

710 2_ British Museum. \$b Dept. of Ceramics.

AACR2 Hybrid

Desc a

040 __ KNM \$c KNM \$d OCLCQ

245 00 Oriental ceramics, the world's great collections / \$c British Museum [and others].

250 __ Standard ed.

260 __ New York : \$b Kodansha International, \$c [approximately 1980-1982]

300 __ 11 volumes : \$b illustrations (some color); \$c 37 cm.

336 __ text \$2 rdacontent

337 __ unmediated\$2 rdamedia

338 ___ volumes \$2 rdacarrier

710 2_ British Museum. \$b Department of Ceramics, \$e host institution.

^{*}Disclaimer: These records are fictitious examples

AACR2 Hybrid

Desc a

O40 __ KNM \$c KNM \$d OCLCQ

245 00 Oriental ceramics, the world's great collections / \$c British Museum [and others].

250 __ Standard ed.

260 __ New York: \$b Kodansha

International, \$c [approximately 1980-1982]

300 __ 11 volumes : \$b illustrations

(some color); \$c 37 cm.

336 __ text \$2 rdacontent

337 __ unmediated\$2 rdamedia

338 ___ volumes \$2 rdacarrier

710 2_ British Museum. \$b Department of Ceramics, \$e host institution.

RDA

Desc i

O40 __ FDA \$b eng \$e rda \$d FDA

245 00 Oriental ceramics, the world's great collections / \$c British Museum, Freer Gallery of Art, National Museum of Korea, and Boston Museum of Fine Arts.

250 __ Revised edition.

264 _1 New York : \$b Kodansha International, \$c 2004.

300 __ 11 volumes : \$b illustrations (some color) ; \$c 40 cm

336 __ text \$2 rdacontent

337 __ unmediated\$2 rdamedia

338 ___ volumes \$2 rdacarrier

710 2_ British Museum. \$b Department of Ceramics, \$e host institution.

^{*}Disclaimer: These records are fictitious examples

Any questions?

Please don't hesitate to contact me!

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