

## Descriptive Cataloging Using RDA Curriculum Outline

### MODULE 1 INTRODUCTION, CONCEPTS, AND TOOLS

Preamble – Scope and Target Audience

I. “Why Do We Catalog?”

- A. Student brainstorming
- B. What others have said

II. Describing Resources

- A. How do we describe anything?
- B. How do we describe bibliographic resources?
  - 1. Looking at surrogates
  - 2. How does the catalog record reflect these elements?

III. Historical Overview of Cataloging Codes

- A. Panizzi
- B. Cutter, “Rules for a Dictionary Catalog”
  - 1. Find a book
  - 2. Show what the library has
  - 3. Assist in the choice of a book
- C. ALA -- gradual development of separate areas for description and ‘entry’
- D. Anglo American Cataloguing Rules -- multiple-entry alphabetical catalogs
- E. ISBD -- framework for descriptive information, across languages
- F. Anglo American Cataloguing Rules, Second edition (1978)
- G. Resource Description and Access (2009)
- H. Subject Cataloging and Classification -- out of scope for this curriculum
- I. For Further Reading

*[Break]*

IV. Descriptive Cataloging Tools

- A. Resource Description and Access
- B. Library of Congress-Program for Cooperative Cataloging Policy Statements
- C. MARC ... and beyond
  - 1. MARC
    - a. Why is a MARC record necessary?
    - b. Content designation – tags, indicators, subfields
    - c. Tag hundreds
    - d. Commonly-used fields
    - e. Access points
    - f. Parallel content
    - g. Subfield patterns
  - 2. Bibliographic Framework Initiative
    - a. transition from MARC to a different framework
    - b. more compatible with the Web-based and Linked-Data environment

## **MODULE 2      FUNCTIONAL REQUIREMENTS FOR BIBLIOGRAPHIC RECORDS (FRBR)**

- I. Introduction -- What is FRBR?
- II. Overview of FRBR
  - A. FRBR entity-relationship model
  - B. Outline of Group 1-3 Entities
  - C. Thinking conceptually
  - D. Group 1 entities – Terminology
  - E. The WEMI entities
  - F. Is FRBR really new?

Online Quiz ([Test yourself! FRBR Terminology](#))

*[Break]*

- III. Group 1 Entities
  - A. Attributes of a work
  - B. Attributes of an expression
  - C. Attributes of a manifestation
  - D. Attributes of an item
- IV. Relationships – The *Other* Part of FRBR
  - A. Inherent relationships
  - B. Other relationships
- V. Group 2 Entities
  - A. What are the Group 2 Entities?
  - B. FRAD User Tasks
  - C. Inter-Group Relationships
  - D. Attributes of Group 2 Entities
    - 1. Person
    - 2. Family
    - 3. Corporate body
  - E. Intra-Group Relationships

## **MODULE 3      RDA TOOLKIT AND ONLINE QUIZZES**

- I. “Using the RDA Toolkit” (hands-on course; Word-format materials)
    - A. Getting started
    - B. Interface and navigation
- [Break]*
- C. Searching
  - D. Personalizing the toolkit
  - E. Help, support, and other resources
- II. Online Quizzes
  - A. [Test Yourself! RDA Toolkit](#)
  - B. [Test yourself! Attributes of FRBR Group 1 Entities](#)

## **MODULE 4      RDA INTRODUCTION AND BACKGROUND; IDENTIFYING MANIFESTATIONS**

- I. RDA Introduction and Background
  - A. What does RDA stand for?
  - B. Why RDA?
  - C. How did RDA come to be?
  - D. RDA as a tool
  - E. FRBR as a foundation for RDA
  - F. International Cataloging Principles
- II. Overview of RDA
  - A. What RDA is
  - B. The structure of RDA
  - C. Supplemental resources
- III. Introduction to Identifying Manifestations
  - A. Coding records as “RDA” records
  - B. Sources
    - 1. Resources with pages, leaves, etc.
    - 2. Moving-Image resources
    - 3. Other resources
  - C. Transcription
    - 1. Transcribed vs. recorded elements
    - 2. What does it mean? (“Take what you see and accept what you get”)
    - 3. Language and script
    - 4. LC Policy
    - 5. Capitalization
    - 6. Punctuation, numerals, symbols, abbreviations
  - D. Where in RDA are the instructions?
- IV. Identifying Manifestations – The Details
  - A. Learning objectives of the unit
    - 1. Concentrate on major principles
    - 2. Focus on Core and LC Core
    - 3. Not format-specific
  - [Break] (20 min.)*
  - B. Title and Statement of responsibility
  - C. Edition
  - D. Numbering of Serials
  - E. Production, Publication, Distribution, Manufacture, Copyright
  - F. Series, Mode of Issuance, Frequency
  - G. Identifier for the Manifestation
  - H. Notes
- V. For Further Assistance
  - A. OCLC Support -- “Bibliographic Formats and Standards”
  - B. RDA bibliographic record practice workform
- VI. Exercise #1 “Identifying Manifestations” -- assigned as “homework” for next module

## **MODULE 5      OTHER MANIFESTATION AND ITEM ELEMENTS; DESCRIBING CARRIERS; DESCRIBING CONTENT**

- I. Follow-Up on Manifestations
  - A. Discussion of Exercise #1 “homework”
    - 1. Emphasis on LC Core
    - 2. Discuss ‘cataloger judgment’ to make other decisions
- II. Other Elements of Manifestations and Items
  - A. Where are the instructions?
  - B. Terms of availability
  - C. Contact information
  - D. Restrictions on access
  - E. Restrictions on use
  - F. Uniform Resource Locator
  - G. Other characteristics
- III. Describing Carriers
  - A. Where are the instructions?
  - B. Content, Media, and Carrier Types
  - C. Extent
  - D. Dimensions
  - [Break]*
  - E. Examples – MARC 300, 336-338
  - F. Exercise #2 “Describing Carriers”
- IV. Describing Content
  - A. Content recorded in the MARC 300 field
    - 1. Duration
    - 2. Illustrative content
    - 3. Colour content
  - B. General guidelines on describing content
  - C. Content -- attributes of the Work
    - 1. Nature
    - 2. Coverage
    - 3. Coordinates
    - 4. Intended audience
    - 5. Dissertation/Thesis
  - D. Content -- attributes of the Expression
    - 1. Summarization
    - 2. Language
    - 3. Form of notation
    - 4. Supplementary content
    - 5. Music resources
    - 6. Cartographic resources
  - E. Exercise #3 “Describing Content”

## MODULE 6 IDENTIFYING WORKS AND EXPRESSIONS

- I. Identifying works
  - A. Where are the instructions?
  - B. “Naming the work”
  - C. LC Policies
- II. Authorized access points for works
  - A. Preferred title for the work
    - 1. Terminology
    - 2. Choosing and recording
    - 3. Parts of a work
  - B. Entities responsible for a work
    - 1. Creators
      - a. Compilers and modifiers as creators
      - b. Corporate bodies as creators
      - c. Government and religious bodies as creators
    - 2. Other entities associated with a work
  - C. Collaborations and compilations
    - 1. How to decide
    - 2. Multiple works by one creator
    - [Break]*
    - 3. Multiple works by multiple creators -- compilations
    - 4. Compilations lacking a collective title
    - 5. Multiple creators -- collaborations
    - 6. Commentaries and editions
  - D. Additions to access points for works
    - 1. LC policy on differentiating works
    - 2. 4 possible additions
      - a. Form of work
      - b. Date of work
      - c. Place of origin of work
      - d. Other distinguishing characteristic
- III. Exercise #4 “Identifying Works”
- IV. Identifying Expressions
  - A. Naming the Expression
  - B. Entities responsible for an expression
  - C. LC Policy
  - D. Authorized access points for expressions
    - 1. General principle
    - 2. Addition of expression elements
      - a. Content type
      - b. Date of expression
      - c. Language of expression
      - d. Other distinguishing characteristic
  - E. Using existing Name Authority Records for works and expressions
- V. Exercise #5 “Identifying Expressions”

## **MODULE 7      RELATIONSHIPS IN RDA; AUTHORITY CONTROL**

- I. Relationships in RDA
    - A. Basics of RDA relationships
      - 1. The What and the Why
      - 2. The Who and the How
      - 3. Relationships Between ...
      - 4. Where are the instructions?
      - 5. Relationship designators
      - 6. Methods of expressing relationships
    - B. Core Relationships -- Between Group One entities and Group Two *entities*
      - 1. Relationships that are expressed in bibliographic records
      - 2. Relationships to a work -- Creator (and other entities)
      - 3. Relationships to an expression -- Contributor
      - 4. Relationships to a manifestation -- Publisher
      - 5. Relationships to an item -- Owner
      - 6. Summary of core Relationships
    - C. Core Relationships -- Between Group One entities and Group One entities
      - 1. Relationships that are expressed in bibliographic or authority records
      - 2. Related works
      - 3. Related expressions
      - 4. Related manifestations
      - 5. Related items
      - 6. Summary of core Relationships
  - [Break]*
  - D. Core Relationships -- Between Group Two entities and Group Two entities
    - 1. Relationships that are expressed in authority records
    - 2. How to record these relationships
    - 3. Core relationships
    - 4. Other relationships
    - 5. Summary of core relationships
  - E. Exercise #6 “Creators and Contributors”
- II. Authority Control
    - A. What is Authority Control?
      - 1. Definitions
      - 2. Why is authority control ‘integral’?
      - 3. Features of Authority Control
    - B. Overview
      - 1. MARC coding of Authority Records
      - 2. Required fields
      - 3. Optional fields
    - C. Examples
    - D. The broader application of controlled vocabularies
      - 1. Controlled terms, codes, and relationship designators in RDA
      - 2. Subjects

## MODULE 8 IDENTIFYING PERSONS, FAMILIES, AND CORPORATE BODIES

- I. Follow-up on Relationships -- Exercise 7 “Relationships”
- II. General Guidelines for Persons, Families, and Corporate Bodies – Chapter 8
  - A. Terminology
  - B. Recording Names
  - C. Authorized Access Points
  - D. Variant Access Points
  - E. Sources
- III. Attributes of Persons – Chapter 9
  - A. Name of the person
  - B. Attributes that may be included in the authorized access point
    - 1. Date
    - 2. Title
    - 3. Fuller form of name
    - 4. Period of activity
  - C. Other attributes -- may *not* be in the access point, but *may* be in the NAR

[Break]

- IV. Attributes of Families – Chapter 10
  - A. Name of the family
  - B. Attributes that may be included in the authorized access point
    - 1. Type of family
    - 2. Date
    - 3. Place
    - 4. Prominent member
  - C. Other attributes -- may *not* be in the access point, but *may* be in the NAR
- V. Attributes of Corporate Bodies – Chapter 11
  - A. What is a corporate body?
  - B. Name of the corporate body
  - C. Attributes that may be included in the authorized access point
    - 1. Type of corporate body
    - 2. Place
    - 3. Associated institution
    - 4. Date
    - 5. Type of jurisdiction
    - 6. Other designation
    - 7. Number, date and location of a conference
  - D. Other attributes -- may *not* be in the access point, but *may* be in the NAR
- VI. Comprehensive Exercises – assigned to be ‘glanced at’ before next Module

Recap flow of courses; General discussion; Q&A

## MODULE NINE COMPREHENSIVE EXERCISES