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

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 Cataloguing 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