

5-14-2015

Applying RDA to digital resources metadata

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Original Citation

Deng, S. & Spyers-Duran, P. (2015). Applying RDA to digital resources metadata. Florida Library Association 2015 Annual Conference. May 14, 2015, Orlando, FL.



Applying RDA to Digital Resources Metadata



2015 FLA Conference

Sai Deng, Peter Spyers-Duran

University of Central Florida Libraries

RDA

- **What is RDA?**

- RDA is the descriptive cataloging standard that replaced AACR2
- Alignment with the conceptual models for bibliographic and authority data:
 - FRBR - Functional Requirements for Bibliographic Records
 - FRAD - Functional Requirements for Authority Data

- **Relationship to Other Standards for Resource Description and Access**
RDA 0.3

- The RDA element set is compatible with ISBD, MARC 21, and Dublin Core. ¹

1. *RDA Toolkit* <http://access.rdatoolkit.org/>

RDA (Cont.)

○ RDA 0.0 Purpose and Scope

- RDA covers all types of content and media.
- RDA supports resource discovery. The data created using RDA to describe a resource are designed to assist users performing the following tasks:
 - Find the resource sought
 - Identify a resource – distinguish between two or more resources
 - Select a resource
 - Obtain – access the resource described
- RDA describes entities associated with a resource (a person, family, corporate body, concept, etc.) are designed to assist users performing the following tasks:
 - Find information about an entity and associated resources
 - Identify – distinguish between two or more entities with similar names, etc.
 - Clarify the relationship between two or more such entities
 - Understand why a particular name or title, or form of name or title, has been chosen as the preferred name or title for the entity.¹

1. *RDA Toolkit* <http://access.rdatoolkit.org/>

RDA (Cont.)

○ RDA 0.1 Key Features

- Chapters 1 – 37: Guidelines and instructions on recording data
 - How to describe resource or entity
- Appendices D and E: Guidelines on the presentation of data
 - Mappings of the RDA element set to ISBD and MARC 21.¹

RDA TOOLKIT
RESOURCE DESCRIPTION & ACCESS

University of Central Florida

RDA TOOLS RESOURCES

+ RDA: Element Set

- RDA Mappings
RDA to MARC Bibliographic Mapping
MARC Bibliographic to RDA Mapping
RDA to MARC Authority Mapping
MARC Authority to RDA Mapping
RDA to MODS Mapping

- Examples of RDA Records (JSC)
MARC Encoding

+ Books of the Bible

+ Workflows

+ Maps

+ 2010 Entity Relationship Diagram (Archival)

+ Schemas (Archival)

MARC BIBLIOGRAPHIC TO RDA MAPPING

MARC 21 Format for Bibliographic Data Mapped to RDA Elements

The table below maps MARC 21 bibliographic elements to the corresponding RDA elements. With the exception of the Leader control fields (00X) and control subfields (\$0-\$8), all MARC 21 fields and subfields are included. Those elements that have no equivalent or are beyond the scope of RDA are indicated as N/A (not applicable).

While there are many instances where there is a one-to-one correspondence between MARC 21 and RDA, there are cases where the level of granularity in the MARC 21 element set and RDA element set differs. Where a single MARC 21 element is equivalent to more than one RDA element, all applicable RDA elements are provided.

MARC 21 FIELD TAG	MARC 21 SUBFIELD CODE	MARC 21 FIELD / SUBFIELD NAME	RDA INSTRUCTION NUMBER	RDA ELEMENT NAME
01X-09X		<i>Number and code fields</i>		
010		Library of Congress control number	N/A	
013		Patent control information	N/A	
015		National bibliography number	N/A	
016		National bibliographic agency control number	N/A	
017		Copyright registration number	N/A	
018		Copyright article-fee code	N/A	

1. RDA Toolkit <http://access.rdatoolkit.org/>

RDA (Cont.)

- **RDA 0.6.2. – 0.6.9 Core elements**
- **RDA 0.6.2 Section 1: Recording Attributes of Manifestation and Item**
 - The following are the minimum elements that should be included when applicable and readily ascertainable.
 - **Title**
 - **Statement of Responsibility**
 - **Edition statement**
 - **Numbering of serials**
 - **Production statement**
 - **Publication statement**
 - **Distribution statement**
 - **Manufacture statement**
 - **Copyright date**
 - **Series statement**
 - **Identifier for the manifestation**
 - **Carrier type**
 - **Extent** (only if the resource is complete or if the total extent is known)¹

Dublin Core

- **What is the Dublin Core?**

- The Dublin Core is a metadata standard for describing a wide range of resources.
- Two levels: Simple and Qualified
- Simple DC comprised of fifteen elements;
- Qualified Dublin Core includes three additional elements (Audience, Provenance and RightsHolder), as well as a group of element refinements (also called qualifiers) that refine the semantics of the elements in ways that may be useful in resource discovery. ^{1,2}

1. Using Dublin Core <http://dublincore.org/documents/usageguide/>

2. Dublin Core Metadata Element Set, Version 1.1 <http://dublincore.org/documents/dces/>

Dublin Core (Cont.)

- **Dublin Core Metadata Element Set, Version 1.1** <http://dublincore.org/documents/dces/>
- **15 core elements**
 - Contributor - An entity responsible for making contributions to the resource.
 - Coverage - The spatial or temporal topic of the resource, the spatial applicability of the resource, or the jurisdiction under which the resource is relevant. named place or a location specified by its geographic coordinates. Temporal topic may be a named period, date, or date range.
 - Creator - An entity primarily responsible for making the resource.
 - Date - A point or period of time associated with an event in the lifecycle of the resource.
 - Description - An account of the resource. abstract, a table of contents, a graphical representation, or a free-text account of the resource.
 - Format - The file format, physical medium, or dimensions of the resource. of dimensions include size and duration. Recommended best practice is to use a controlled vocabulary such as the list of Internet Media Types [MIME].
 - Identifier - An unambiguous reference to the resource within a given context.
 - Language - A language of the resource. Recommended best practice is to use a controlled vocabulary such as RFC 4646 [RFC4646].
 - Publisher - An entity responsible for making the resource available. Examples of a Publisher include a person, an organization, or a service.
 - Relation - A related resource. Recommended best practice is to identify the related resource by means of a string conforming to a formal identification system.
 - Rights - Information about rights held in and over the resource.
 - Source - A related resource from which the described resource is derived.
 - Subject - The topic of the resource. The subject will be represented using keywords, key phrases, or classification codes. Recommended best practice is to use a controlled vocabulary.
 - Title - A name given to the resource.
 - Type - Recommended best practice is to use a controlled vocabulary such as the DCMI Type Vocabulary [DCMITYPE]. To describe the file format, physical medium, or dimensions of the resource, use the Format element.

Dublin Core (Cont.)

- **DCMI Index of Terms** <http://purl.org/dc/elements/1.1/>
 - A listing of all DC metadata terms including:
 - core elements, qualified core elements, element refinement qualifiers

Index of Terms

Properties in the /terms/ namespace	abstract , accessRights , accrualMethod , accrualPeriodicity , accrualPolicy , alternative , audience , available , bibliographicCitation , conformsTo , contributor , coverage , created , creator , date , dateAccepted , dateCopyrighted , dateSubmitted , description , educationLevel , extent , format , hasFormat , hasPart , hasVersion , identifier , instructionalMethod , isFormatOf , isPartOf , isReferencedBy , isReplacedBy , isRequiredBy , issued , isVersionOf , language , license , mediator , medium , modified , provenance , publisher , references , relation , replaces , requires , rights , rightsHolder , source , spatial , subject , tableOfContents , temporal , title , type , valid
Properties in the /elements/1.1/ namespace	contributor , coverage , creator , date , description , format , identifier , language , publisher , relation , rights , source , subject , title , type
Vocabulary Encoding Schemes	DCMIType , DDC , IMT , LCC , LCSH , MESH , NLM , TGN , UDC
Syntax Encoding Schemes	Box , ISO3166 , ISO639-2 , ISO639-3 , Period , Point , RFC1766 , RFC3066 , RFC4646 , RFC5646 , URI , W3CDTF
Classes	Agent , AgentClass , BibliographicResource , FileFormat , Frequency , Jurisdiction , LicenseDocument , LinguisticSystem , Location , LocationPeriodOrJurisdiction , MediaType , MediaTypeOrExtent , MethodOfAccrual , MethodOfInstruction , PeriodOfTime , PhysicalMedium , PhysicalResource , Policy , ProvenanceStatement , RightsStatement , SizeOrDuration , Standard
DCMI Type Vocabulary	Collection , Dataset , Event , Image , InteractiveResource , MovingImage , PhysicalObject , Service , Software , Sound , StillImage , Text
Terms related to the DCMI Abstract Model	memberOf , VocabularyEncodingScheme

MODS

- MODS – Metadata Object Description Schema is a metadata standard describing a wide range of resources., and particularly for library applications. ¹
- **Outline of Elements in MODS Version 3.5**
 - <http://www.loc.gov/standards/mods/mods-outline-3-5.html>

Top Level Elements:

[titleInfo](#)

[name](#)

[typeOfResource](#)

[genre](#)

[originInfo](#)

[language](#)

[physicalDescription](#)

[abstract](#)

[tableOfContents](#)

[targetAudience](#)

[note](#)

[subject](#)

[classification](#)

[relatedItem](#)

[identifier](#)

[location](#)

[accessCondition](#)

[part](#)

[extension](#)

[recordInfo](#)

Root Elements:

[mods](#)

[modsCollection](#)

DACS

- DACS: Describing Archives: A Content Standard
- A metadata standard for describing archival materials that can be applied to all material types.¹
- 25 elements.²

Describing Archives: A Content Standard, Second Edition (DACS) was published in 2013.²

- The Second Edition consists of two parts: Describing Archival Materials and Archival Authority Records.
- Appendices feature a list of companion standards and crosswalks to ISAD(G), ISAAR(CPF), MARC 21, EAD, EAC, and Resource Description and Access (RDA). Also included is an index
- RDA supersedes AACR2 as a Companion Content Standards

1. Describing Archives: A Content Standard, Second Edition (DACS) <http://www2.archivists.org/groups/technical-subcommittee-on-describing-archives-a-content-standard-dacs/dacs>

2. DACS Second Edition (2013; revised March 2015) PDF http://files.archivists.org/pubs/DACS2E-2013_v0315.pdf

UCF Libraries Content & Digital Asset Management Systems

○ **CONTENTdm at UCF Libraries**

- Images, manuscripts, university archival materials and other digital collections including community collections.
- Metadata schema: Dublin Core, locally defined elements, Visual Resources Association (VRA) Core element, and Encoded Archival Description (EAD) standards

○ **DigiTool: State University Libraries of Florida**

- DigiTool is hosted by Florida Virtual Campus for the state universities and state colleges of Florida.
- Local history and culture heritage materials in the UCF Special Collections and University Archives.
- Metadata schema: Dublin Core, MODS, MarcXML and METS.

UCF Libraries Content & Digital Asset Management Systems (Cont.)

- **Islandora** is an open source Digital Asset Management System based on FedoraCommons.
- **FL Islandora**
https://islandora.pubwiki.fcla.edu/wiki/index.php/Main_Page
 - FL Islandora is hosted by Florida Virtual Campus for the state universities and state colleges
 - All decisions are made collaboratively
 - Florida Heritage, PRISM, Florida Historical Quarterly
 - Metadata schema: Dublin Core, MODS, MarcXML and METS

The Wider Context

- Resource Description and Access (RDA) has been developed for the digital world and it is still undergoing changes;
- The descriptive standards for the archival, museum, and library communities have become more converged;
- The development of RDA greatly affected other standards in the library and archival world, and it led to the accommodation of RDA in MODS, and the revision of Describing Archives: A Content Standard (DACS);
- National tests of applying RDA to non-MARC metadata standards in 2010 concluded that RDA cannot be fully realized or applied without an applicable system;
- While the framework and system are under development, small scale of RDA application in current content management systems is ongoing in some libraries.

RDA Changes

- RDA is the new, unified cataloging standard which is designed for the digital world and an expanding universe of metadata users.
- Major changes from AACR2:
 - "Take what you see" (representation principle)
 - Fewer abbreviations (clear for the users)
 - No more "rule of three" for MARC (More access points)
 - Sources for information expanded
 - Content, Media, and Carrier types
 - Controlled vocabularies available as registries for the semantic web

RDA-DC

- The RDA approach of **describing** characteristics of the **digital reproduction** is ambiguous in form, and does not meet the user needs compared to the other approach of chiefly describing the original counterparts using DC;
- **RDA-DC mapping**: semantic disjunction, many-to-one relationship;
- DC only supports a few refinements, not including the **roles** in RDA;
- To accommodate **RDA value vocabularies**, local qualified DC schema needs to be developed;
- **The RDA non-MARC Tests** (Wacker, Han and Dartt, 2011)
- **DCMI/RDA Task Group**: RDA Dublin Core Application Profile (DCAP)
- Understanding RDA as a DC Application Profile (Taniguchi, Shoichi, 2013)

RDA-MODS

- **MODS 3.4** has been developed to accommodate RDA:
 - Added "family" as a **type** attribute (mods:name type="family");
 - Incorporated some RDA **value vocabularies**: RDA's "Modes of Issuance" mapped to <mods:originInfo><mods:issuance>;
 - Added attribute <**supplied**> for several MODS elements;
 - Can **include URIs for terms** from the LC subject authority file, RDA value vocabularies, role terms, content, media and carrier types, e.g., <mods:form authority="rdacarrier" authorityURI="" type="carrier" valueURI=""> .
- **The RDA non-MARC Tests** (Wacker, Han and Dartt, 2011)
- **RDA to MODS Mapping** (in RDA Toolkit)

RDA-DACS

- Some RDA changes are **in accord with current archival practice**, such as, inclusion of family names as a type of creator, added granularity to name authority records, not using abbreviations;
- It is not easy to accommodate RDA core elements in archival description, particularly content type and carrier type, because these **vocabularies** sometimes do not reference archival materials well;
- The RDA non-MARC Tests (Wacker, Han and Dartt, 2011)
- In response to the RDA release, the Society of American Archivists revised DACS:
 - **Describing Archives: A Content Standard, 2nd edition, 2013**
(<http://files.archivists.org/pubs/DACS2E-2013.pdf>)
 - **Some changes:** the removal of Part III which had been superseded by RDA (mainly those related to family names creation); use "devised titles" to replace "supplied titles"...

Accommodating RDA

- The benefits of RDA "were not fully realized or applied" during the national RDA non-MARC test;
- The test concludes that it is not easy to evaluate RDA "without an application available to aptly manage and display the data";
- However, before we have a new system, what can we do in existing CMS and DAMS?
 - **Ball State University's RDA Compliance Project** (Leigh, K. & Leigh, R., 2014): made some heading changes across its Digital Media Repository;
 - Mostly based on **Library of Congress's memo** "Changes to Headings in the LC Catalog to Accommodate RDA", 2013.
 - What can UCF Libraries do to accommodate RDA for digital collection records creation, enhancement and migration?

Applying RDA to CONTENTdm Collections: Personal Headings

- **Issue: Do we need to add year or role term to names in DC records?**
 - DC cannot distinguish between name, role and year in a name heading (MODS can).
 - Some add role at the end of the name using "[]" or "()", but **role cannot be marked up** in DC.
 - Bibliographic and authority work are both based on the FRBR and FRAD models; when using LC authorized names, **role can be part of the authorized name.**
- **Personal Name Headings – Qualifiers**
 - RDA 9.19.1.2 **Title** or Other Designation Associated with the Person
 - RDA 9.19.1.3 **Date** of Birth and/or Death
 - RDA 9.19.1.4 **Fuller Form** of Name
 - RDA 9.19.1.5 **Period of Activity** of the Person and/or **Profession** or **Occupation**

Applying RDA to CONTENTdm Collections: Personal Headings (Cont.)

- University Archives: change "Outcault, Richard Felton" to Outcault, Richard Felton, 1863-1928 (LC authorized term).
- St. Luke's Collection: Construct name heading for Slovak names, e.g., Mikler, Michael, Ml., 1906-1939
 - Ml. ("mladsi"-younger)... (In Slovak language, "mladsi" means younger, "starsi" means elder)
- Harrison Price Papers: "Price, Harrison" is a LC authorized term. No need to add year or role.

Applying RDA to CONTENTdm Collections: Family Name Headings

- RDA provides guidelines for the creation and use of descriptive access points for family names.
 - 10.1 Constructing Access Points to Represent Families
 - 10.3 **Type** of Family
 - 10.4 **Date** Associated with the Family
 - 10.5 **Place** Associated with the Family
 - 10.6 **Prominent Member** of the Family
 - An example in RDA Toolkit: Peale (Family : Peale, Charles Willson, 1741–1827)
- **St. Luke's Collection:** St. Luke's Lutheran Church family name headings are not in LCSH
 - Replace old heading with
 - Duda Family Duda (Family : Seminole County, Fla.)
 - Jakubcin Family Jakubcin (Family : Seminole County, Fla.)
 - Lukas Family Lukas (Family : Seminole County, Fla.)
 - Mikler Family Mikler (Family : Seminole County, Fla.)
 - Tuhy Family Tuhy (Family : Seminole County, Fla.)
- Corporate Name Headings: RDA 11.2.2.3 Choosing the Preferred Name (choose the name by which the corporate body is commonly identified)
 - Example: Duda & Sons, Inc.

Applying RDA to CONTENTdm Collections: Corporate Name Headings

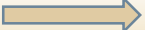
(Cont.)

- Expanding certain abbreviations in corporate headings:

- University Archives: Name/author and subject-unit changes

- "Dept." changed to "Department", e.g.,

Florida Technological University Library Reference Dept 
Florida Technological University. Library. Reference Department

University of Central Florida. Dept. of Chemistry 
University of Central Florida. Department of Chemistry

- "UCF" changed to "University of Central Florida.", e.g.,

UCF Library 
University of Central Florida. Library

UCF College of Education 
University of Central Florida. College of Education

Place Changes to be Compliant to RDA

- **UCF Community Veterans History Project**
- **Home State** (of the veteran):
 - **Use RDA: B.11 Names of Certain Countries, States, Provinces, Territories, Etc.**
 - E.g., Ala., Ark., Calif., Conn., D.C., Del., Fla., Ga., Ill., Ind., Iowa, Kan., Ky., La., Mass., Md., Me., Mich., Minn., Miss., Mo., N.C., N.D., N.H., N.J., N.Y., Neb., Okla., Or., Pa., R.I., S.C., S.D., Tenn., Tex., Va., Vt., Wash. Wis., Wyo.
 - If not in RDA: B.11, use **postal abbreviation**: HI, ID, IA, OH, UT
 - **If not available, use**: N/A (for foreign places), Unknown
- **Place of Birth**: Orlando, Fla.; Mount Savage, Md. (States use standard abbreviations)

Place Changes to be Compliant to RDA (Cont.)

- **Location of Service** (mapped to Coverage-Spatial):

- Format change to conform to LC Name Authority File- Geographic Headings

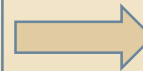
- **Places:**

- Charleston, S.C.; Ardmore, Okla.; Beaufort, S.C.

- Baghdad, Iraq; Biche, France; Berlin, Germany

- **Camps:**

Camp Coyote, **Kuwait**
Camp Dix, N.J.
Camp Elliott, Calif.
Camp Liberty, Iraq
Forward Operating Base (FOB) Falcon, Iraq



Camp Coyote (**Kuwait**)
Camp Dix (N.J.)
Camp Elliott (Calif.)
Camp Liberty (Iraq)
Camp Al-Saqr (Iraq)

- **Military bases:**

Al Asad Airbase, Iraq
Camp Al Asad, Al Anbar, Iraq
Al Jabber Airbase, Kuwait
Clarke Air Base, Philippines
Royal Air Force Base Alconbury
Lackland AFB, San Antonio, Tex.



Al Asad Airbase (Iraq)
Al Jabber Airbase (Kuwait)
Clarke Air Base (Philippines)
Royal Air Force Alconbury (England)
Lackland Air Force Base (Tex.)

Expanding Abbreviations for Dates and Uniform Titles

○ Expanding certain abbreviations for dates in personal heading

- Personal name heading with an active date

fl. \implies active

- Personal name heading with a birth month

Dec. \implies December

- Personal name heading with a century

cent. \implies Century

○ Expanding certain abbreviations for uniform titles

- Uniform titles with abbreviated word

acc. \implies Accompaniment

Preferred Source of Information

- **RDA 2.2.2 Preferred Source of Information**

- **RDA 2.2.2.2 Resources Consisting of One or More Pages, Leaves, Sheets, or Cards (or Images of One or More Pages, Leaves, Sheets, or Cards).**

- Use the title page, title sheet, or title card (or an image of it),
- Use an eye-readable permanently printed label...;

- **If not available, use the first of the following sources that has a title:**

- a cover or jacket issued with the resource (or an image of a cover or jacket);
- a caption (or an image of a caption);
- a masthead (or an image of a masthead);
- a colophon (or an image of a colophon).

- **If none available,**

- Use ... another source within the resource that has a title. Give preference to a source in which the information is formally presented.

Recording Devised Titles

○ 2.3.2.10 Resource with No Title

- If there is no title in the resource itself, record as the title proper:
 - *either* a) a title taken from another source
 - *or* b) a devised title.
 - Make a note to indicate the source of the title proper.

○ 2.3.2.11 Recording Devised Titles

- *If*: the resource itself has no title *and* a title cannot be found in any of the other sources of information specified at 2.2.4 (*accompanying material, other published descriptions of the resource, a container, a reference source...)
- *then*: devise a brief descriptive title that indicates *either*:
 - a) the **nature** of the resource (e.g., map, literary manuscript, diary, advertisement)
 - *or* b) its **subject** (e.g., names of persons, corporate bodies, objects, activities, events, geographical area and dates)
 - *or* c) a combination of the two, as appropriate.

Title Transcription Examples

○ University Archives examples:

- An Early Breakfast on a "Dinah" (Postcard),
 - or, Postcard with printed words "An Early Breakfast on a 'Dinah'"
 - Transcribe what's printed on the postcard.
- Rev. Dr. Breckenridge
 - Based on handwritten notes on the back of the printed photograph.
- Ballou's Pictorial: Scenes in New Orleans
 - Transcribe the most predominant part on the page.
- Add an alternative title to clarify, e.g.,
 - Baker's Delight Baking Powder (transcribe what's on the item)
 - Alternative title: Billboard of Baker's Delight Baking Powder
- Devise a title: Portrait of a young African American female

Title Transcription Examples (Cont.)

○ **Title** Black Dandy

○ **Description** Black Dandy + Fence painter + child, illustrated (color)



Changed to

○ **Title** Excelsior: Ready Mixed Paints

○ **Description** Advertisement of Excelsior Ready Mixed Paints. With the illustration of Black Dandy, Fence painter and a child. In color. Includes calendar of May 1891 at the bottom.

○ **Title** "Best in Town"

○ **Description** Lautz Bros. & Co. Soaps, "Best in Town"



Changed to

○ **Title** Use Lautz Bros. & Co's Soaps

○ **Title-Alternative** Black Americana Lautz Bros. & Co's Soap Trade Card

○ **Description** Black Americana Lautz Bros. & Co's Soap Trade Card. Illustrated with a black boy carrying a drum. Has text "Use Lautz Bros. & Co's Soaps" and "Best in the Market" below the picture.

Other Transcribing Issues

- **5.9.1 Basic Instructions on Making Cataloguer's Notes**
- 5.9.1.1 Scope A cataloguer's note is an annotation that clarifies the selection and recording of identifying attributes, relationship data, or access points for the entity.
- **The Central Florida Future Newspaper: Debating between "Transcribe as found" and adding added value content**
 - **Spell out abbreviations** (for newspaper headlines)
 - S.G.A. to form [S.G.A., Student Government Association]
 - HEW [Department of Health, Education and Welfare] gives FTU more \$\$
 - **Adding added value content, such as names**
 - Orlando's own astronaut [John W. Young] to be graduation speaker
 - Music head announced [: Dr. Leonidas N. Sarakatsannis]
 - **Specifying "photo" in headline/content description** (no separate photo descriptions)
 - Millican explains the university seal during Sunday's open house (photo)
 - **Adding explanations**
 - "Strive for excellence" [Remarks by Chester Ferguson]
 - **Recording column changes for early issues**
 - The Voice of the Future [Column, name changed from "Editorial"]

"Transcribe as found" vs.
Spell out abbreviations

"Transcribe as found" vs.
Added value content

Type, Format, Genre Maze

○ DCMI types:

Collection, Dataset,
Event, **Image**, Interactive
Resource, **MovingImage**,
Service, Software,
Sound, StillImage, Text

○ RDA Media types:

audio, computer,
microform, microscopic,
other, projected,
stereographic,
unmediated,
unspecified, **video**

○ Type Example: Carol Mundy Collection

○ DCMI Type Vocabulary Terms (Added to all records): Still image, Text, Image

○ Added **Genre** and/or Subject Terms from **Thesaurus for Graphic Materials (TGM)**:

○ Advertisements; Aerial views; Caricatures; Cartoons (Commentary); Children's comics; Color photographs (*genre only); Comics; Drawings; Engravings; Fans (Ephemera); Magazine illustrations (*variants); Newspaper Illustrations (*variants); Periodical illustrations; Newspapers; Photographic postcards; Photographic prints; Photographs; Portrait photographs; Postcards; Prints

○ *Included variants.

○ In checking student worker added terms, if not in TGM, will see if they are in **RBMS Controlled Vocabularies**

○ Yes: Academic catalogs, Periodicals, Serials (keep)

○ No: Billboards, Journal Serial, Journals (delete from the controlled list)

Type, Format, Genre Maze

(Cont.)

- For most special collection objects, use the following terms for Format:
 - application/pdf
 - image/jp2
 - image/tiff

- **3.19.3.3 Recording Encoding Format**
 - Lists of terms for audio, data, image, text and video encoding formats...
 - If none of the terms in the list is appropriate or sufficiently specific, use another concise term or terms to indicate the encoding format.
 - **Example: Community Veteran History Project**
 - **Format: use creator specified lists**
 - **VIDEO:** Betacam, VHS, 8mm, High-8, DVD, other
 - **AUDIO:** Cassette, CD, Digital (DAT)
 - **Type:** Audio, Sound, MovingImage, Video, unspecified

Applying RDA in Islandora

- The state-wide implementation of Islandora is led by Florida Virtual Campus (FLVC). It adopted MODS 3.4, and it generates MARCXML on the fly.
- **Islandora Collection and Metadata Migration @ UCF**
 - **DigiTool collections:** Political & Rights Issues & Social Movements (PRISM, available in DC format), Florida Heritage (MARCXML available), Florida Historical Quarterly
 - **CONTENTdm collections:** University Archives, Civil War, Harrison Buzz Price, Theses and Dissertations, UCF Community Veterans History... (in CONTENTdm DC format)
- **How to apply RDA in Islandora collection migration?**
 - DC-MODS (for initial migration, RDA not implemented)
 - MARCXML-MODS 3.4: FLVC customized stylesheet (MARC21slim2MODS3-4)
 - **Post-transformation Editing** (in MODS form, or, MODS XML file)

Identify RDA Records in MARC


- In MARC, to identify RDA records, look for:
 - Leader/18 value "I" (ISBD), 040 \$a ____ \$b eng \$c ____ \$e rda
 - The three new fields: 336, 337 and 338;
 - Transcribed as found (245 \$a \$c) (e.g. uppercases and typos in title, lengthy statement of responsibility);
 - "[publisher not identified] etc. in 264;
 - Copyright symbol (©) and phonogram symbol (℗) in 264 \$c;
 - Lack of abbreviations (300, 250...);
 - No more "Rule of Three" (e.g. more than three for transcribed creators, added access points, conference locations...)
 - Relationship designators (e.g. translation of ..., adaptation of ...)

MODS Form

- Based on MODS 3.4; created by FLVC.
- How to identify RDA Record in MODS

Record info

Information about the metadata record.

Description Standard
 

Designates the rules used for the content of the description, if applicable.

Content source

The code or name of the organization that either created or modified the original record.

Creation date

The date or date and time on which the original MODS record was first created.

Change date

The date or date and time the original MODS record was last modified.

Record identifier


Contains the system control number assigned by the organization creating, using, or distributing the record.

Record origin

Shows the origin or provenance of the MODS record. Use this subelement to record information about the origin, or provenance of the MODS record including what methods were used to prepare the MODS record (machine generated or human prepared) and what transformations have been applied (e.g., the result of converting an existing MARC 21 record to MARCXML and to MODS).

Identify RDA in MODS

```
<recordInfo>  
  <descriptionStandard>rda</descriptionStandard>  
  <recordContentSource  
authority="marcorg">FHM</recordContentSource  
>  
  <recordCreationDate  
encoding="marc">881007</recordCreationDate>  
  <recordChangeDate  
encoding="iso8601">20040622120251.6</record  
ChangeDate>  
  
<recordIdentifier>QFAAA7017</recordIdentifier>  
  <recordOrigin>Converted from MARCXML to  
MODS v3.4 using MARC21slim2MODS3-  
4_FLVC.xsl (LOC rev 1.86 / 20130610) (FLVC  
v7)</recordOrigin>  
  <languageOfCataloging>  
<languageTerm type="code" authority="iso639-  
2b">eng</languageTerm>  
  </languageOfCataloging>  
</recordInfo>
```



- MODS Generated MARC display:
040 ## |a FHM
- Should be: **040 \$a FHM \$b eng \$e rda;**
- Language information code in MODS:
 - <languageOfCataloging><languageTerm type="code" authority="iso639-2b">eng</languageTerm>
 - It should be mapped to 040 \$b eng, currently it does not display in MARC;
- Description standard information in MODS:
 - <descriptionStandard>rda</descriptionStandard>;
 - Should be mapped to MARC 040 \$e rda, currently does not display in MARC though.
- MODS-MARC stylesheet needs more adjustments to accommodate RDA.

Applying RDA to Islandora Collections

- **RDA: I.3.1 Relationship Designators for Contributors**

- Record an appropriate term from the following list with the authorized access point or identifier for a contributor to an expression (see 20.2). Apply the general guidelines on using relationship designators at I.1.

- **Expanding certain abbreviations for personal headings, expanding or changing the format of role.**

- **Title: Early days in Melbourne Beach, 1888-1928.**

○ Name(s): Thomas, Frank J.
Beynroth, Ewing, **ill.**
PALMM (Project)



○ Name(s): Thomas, Frank J.
Beynroth, Ewing, **illustrator**
PALMM (Project)

○ In Marc: 100 1# | a Thomas, Frank J.
700 1# | a Beynroth, Ewing | e **illustrator**
710 2# | a PALMM (Project).

○ <https://ucf.digital.flvc.org/islandora/object/ucf%3A19602#page/FrontCover/mode/2up>

Personal Names: Add Relationship Designators

- Name(s): Emery, Don J.
Daytona Beach Area Chamber of Commerce

↓ Changed to

- Name(s): Daytona Beach Area Chamber of Commerce
Emery, Don J., **illustrator** (*cover designer)

- **MARC display:**
110 2# |a Daytona Beach Area Chamber of Commerce.
700 1# |a Emery, Don J., |e **illustrator**
<https://ucf.digital.flvc.org/islandora/object/ucf%3A22284#page/01FrontCover/mode/2up>

Personal Names with Birth Date

- Personal name heading with a birth date (b.yyyy changed to yyyy-)

- Vail, Charles H. (Charles Henry), **b. 1866**



Changed to

- Vail, Charles H. (Charles Henry), **1866-**

- In MODS:

```
<name type="personal">
  <namePart>Vail, Charles H. (Charles Henry)</namePart>
  <namePart type="date">1866-</namePart>
  <role>
    <roleTerm type="text" authority="marcrelator">creator</roleTerm>
  </role>
</name>
```

- **Display:** Vail, Charles H. (Charles Henry), 1866-, creator

Personal Names with Death Date

- Personal name heading with a death date

○ Burns, Emile, Labour Research Department, **b. 1889**



Changed to

○ Burns, Emile, **1889-1972**

- In MODS:

```
<name type="personal">
  <namePart>Burns, Emile</namePart>
  <namePart type="date">1889-1972</namePart>
  <role>
    <roleTerm type="text" authority="marcrelator">creator</roleTerm>
  </role>
</name>
<name type="corporate">
  <namePart>Labour Research Department</namePart>
  <role>
    <roleTerm type="text" authority="marcrelator">contributor</roleTerm>
  </role>
</name>
```

○ Display: Name(s): Burns, Emile, 1889-1972, creator

○ Labour Research Department, contributor

Statement of Responsibility

- RDA 2.4.1.4 Transcribe a statement of responsibility as it appears on the source of information
- RDA 2.4.1.8 Noun Phrases Occurring with a Statement of Responsibility
 - If a noun or noun phrase occurs with a statement of responsibility, treat the noun or noun phrase as part of the statement of responsibility. E.g., research and text by Colin Barham...
- Islandora records transformation example:
 - In MODS-MARC transformation, if it's only the name (245 \$c statement of responsibility) (e.g., "by author") transformed to the **Notes** field, will delete it.
 - For example: Deleted "by James McQuade" for Notes field in post-transformation editing in MODS form.
 - <https://ucf.digital.flvc.org/islandora/object/ucf%3A6968#page/xvi/mode/2up>
 - If it has more information than "by author", will keep it in the Notes field.

Publisher & Language

- **RDA 2.8.4.7 No Publisher Identified**

- Record publisher not identified if: no publisher is named within the resource itself and the publisher cannot be identified from other sources (see 2.2.4). For example,

- Publisher: [publisher not identified]
- Place of Publication: [place of publication not identified]

- <https://ucf.digital.flvc.org/islandora/object/ucf%3A18143#page/FrontCover/mode/2up>

- In MARC:

- 260 \$a [S.I. : \$b s.n.]... (AACR2)
- 264_1 \$a [place of publication not identified] : \$b [publisher not identified], \$c yyyy. (RDA)

- Language

- Language (code): eng, spa
- Add Language (text), e.g., English, Spanish

Physical description

○ 3.4.5 Extent of text

○ Examples:

○ 267 pages, <12> l. of plates : illustrations (some col.), fold. col. map ; 24 cm.

○ 17, [6] pages : illustrations, map ; 23 cm.

○ 2 maps (1 col.)

○ 589 pages : illustrations, ports. ; 22 cm.

○ 275, xv pages : illustrations, maps (1 col.), ports. ; 19 cm.

○ 144, [47] pages, [8] leaves of plates : illustrations, map ; 19 cm.

○ 267 pages, 12 unnumbered leaves of plates : illustrations (some color), folded color map ; 24 cm.

○ 17, 6 unnumbered pages : illustrations, map ; 23 cm.

○ 2 maps (1 color)

○ 589 pages : illustrations, portraits ; 22 cm.

○ 275, xv pages : illustrations, maps (1 color), portraits ; 19 cm.

○ 144 pages, 47 unnumbered pages, 8 unnumbered leaves of plates : illustrations, map ; 19 cm.

RDA Content, Media and Carrier

○ MODS:

<physicalDescription>

<form authority="marcform">electronic</form>

<form type="media" authority="rdamedia">computer</form>

<form type="carrier" authority="rdacarrier">online resource</form>

<form authority="marccategory">electronic resource</form>

<form authority="marcsmd">remote</form>

<extent>109 pages : illustrations ; 24 cm.</extent>

<form authority="RDA carrier terms">online resource</form>

</physicalDescription>

<genre authority="rdacontent">text</genre>

○ MARC:

337 ## |a computer |2 rdamedia

338 ## |a online resource |2 rdacarrier

380 #7 |a text |2 rdacontent

○ **Display:** (suppressed repetitive/similar information display)

○ **Physical Form:** electronic resource

- Can adjust the MODS-MARC stylesheet:
 - if it's rdacontent, map it to MARC 336;
 - if it's marcgt or other term, map it to MARC 380, e.g., Gsafd: Adventure fiction.

Subjects

- **RDA: 23.1.3 Subject**

- **Some examples from the collections**

- **Orlando, Fla** -- Social life and customs -- 20th century -- Pictorial works

- Orlando, Fla -- Pictorial works



Changed to

- **Orlando (Fla)** -- Social life and customs -- 20th century -- Pictorial works

- Orlando (Fla) -- Pictorial works

- **Geographic subject**

- **LCSH:** Havana (Cuba); Nassau (Bahamas); Florida; Slavia (Fla.)

- **Topical subject (Florida Heritage Collection uses a combination of LCSH, Sears and local subjects)**

- **FHP** Economics and Society: Post-Civil War Florida, 1865-1913;

- Florida During World War I, 1914-1918;

- Contemporary Florida, 1960-

- **Sears** History; Military history; Social history

- **LCSH** Historic buildings – Florida

Related Item

- **RDA Section 8: Recording Relationships between Works, Expressions, Manifestations, & Items**
 - **25.1 Related Work**
 - **25.1.1.3 Recording Relationships to Related Works**
 - Identifier, authorized access point, Structured Description, Unstructured Description
 - Examples: finding aid: url; In series:...; Supplement to; Includes map...
 - **26.1 Related Expressions**
 - **26.1.1.3 Recording Relationships to Related Expressions**
 - Examples: Revision of, translation of, libretto for, abridged as, continued by...
 - **27.1 Related Manifestations**
 - **27.1.1.3 Recording Relationships to Related Manifestations**
 - Examples: Electronic reproduction, reprint of, inserted in, special issue of...
 - **28.1 Related Item**
 - **28.1.1.3 Recording Relationships to Related Items**
 - Examples: Facsimile of, reproduction of, copy of...

Related Item (Cont.)

- **Title:** Winter Park Florida.
- **Name(s):** Winter Park Chamber of Commerce
- **Original Title:** Winter Park Florida.
(OCoLC)81150601
- **Persistent Link to This Record:**
<http://purl.flvc.org/fcla/tc/fhp/CF00001734.jpg>
- **Is Part of Series:** Florida Heritage Collection. ([Link to Collection](#))

- **Related Item types:**
 - Host; constituent (related work...)
 - Series (related work)
 - Is referenced by (related work or expression...)
 - Other version (related expression or manifestation)
 - Preceding, succeeding (related expression...)
 - Original (related manifestation)
 - Other format (related manifestation)

...

○ In MODS:

```
<titleInfo>
  <title>Winter Park Florida</title>
</titleInfo>
...
<relatedItem type="original">
  <identifier>(OCoLC)81150601</identifier>
  <titleInfo>
    <title>Winter Park Florida</title>
  </titleInfo>
</relatedItem>
<relatedItem type="series">
  <titleInfo>
    <title>Florida Heritage Collection</title>
  </titleInfo>
  <location><url displayLabel="(Link to
Collection)">https://ucf.digital.flvc.org/islan
dora/object/ucf%3Aflheritage</url>
  </location>
</relatedItem>
```


RDA Serial Records in MARC

- When cataloging serials we use the RDA CONSER Standard Record as our guide.
- RDA CONSER Standard Record (CSR) Metadata Application Profile

<http://www.loc.gov/aba/pcc/conser/documents/CONSER-RDA-CSR.pdf>

➤ Useful RDA instructions and notes.

RDA Instructions & Elements	RDA no.	Notes	MARC encoding
General guidelines on transcription *	1.7.1 Alternative (1 st)	Rare materials: Use <i>Descriptive Cataloging of Rare Materials (Serials)</i> as the "designated published style manual" in place of the instructions given under RDA 1.7.2-1.7.9 for transcribing punctuation, numerals, symbols, abbreviations, etc.	Varies
Numbers expressed as numerals or as words *	1.8.1	Rare materials: Apply the RDA alternative for early printed resources.	Varies
Form of numerals *	1.8.2	Rare materials: Apply the first alternative to record numerals in the form in which they appear on the source of information (for example, roman).	Varies
Numbers expressed as words *	1.8.3	Rare materials: Record numbers in the form in which they appear on the source of information (see DCRM(S) 0G, 3A3).	Varies
Recording titles (T)	2.3.1.4	Rare materials: Generally do not abridge titles.	Varies
Title proper (T)	2.3.2		245
Title in more than one form (T)	2.3.2.5	Record <u>initialisms/acronyms</u> of the title proper not chosen as the title proper as variant titles in field 246 only, rather than as other title information. Rare materials: <i>Transcribe</i> initialisms/acronyms of the title proper as other title information in field 245 (see DCRM(S) 1B1.3, 1D) and record also in field 246 for access.	245, 246
Parallel title proper (T)	2.3.3	Record all in 246. Rare materials: Record all parallel titles appearing on the same source as the title proper in 245 and record also in 246 for access.	245, 246
Other title information (T)	2.3.4	Record if it provides clarification or support to the title proper that otherwise might appear misleading without the other title information. Rare materials: <i>Transcribe</i> other title information according to DCRM(S) 1D.	245
Variant title (T)	2.3.6	Record <u>initialisms/acronyms</u> of the title proper not chosen as the title proper as variant titles in field 246 only, rather than as other title information.	245, 246

Serial Numbering

- **RDA 6.16.1.3.1 Serial Number**

...Select one form of numeric designation and use it for all the works in the series.

- **A CONTENTdm Example: Central Florida Future (local practice)**

- **Title: Central Florida Future, Vol. 18 No. 47, April 29, 1986**

- **Title: Central Florida Future, Vol. 01 No. 01, October 7, 1968**

- Title-Alternative: F.T.U.???**

- (What's on paper: F.T.U.??? Vol. 1 Number 1 Orlando, Fla. Oct. 7, 1968)**

- **Uniform Title: Central Florida Future (Orlando, Fla.)**

Serial Record for Florida Historical Quarterly in FL Islandora

Related items

1

Type

constituent

constituent

host

is referenced by

original

other format

other version

preceding

references

review of

series

succeeding

Any initial article that should not be used for filing or database searches.

Title

Florida Historical Quarterly

Subtitle

A word, phrase, character, or group of characters that contains the remainder of the title information after the title proper.

Part Number

The place a single item holds in a collection or series of works, for example, a volume or series number.

Part Name

The title of an individual item in a collection or series of works; should not be used for subtitle.


Language

The language of the main title, usually the same language as the text.

Authority

The controlled vocabulary from which the title was taken.

Display label



Serial Record for Florida Historical Quarterly in FL Islandora (cont.)

- **Title:** The Florida Historical Quarterly.
- **Alternative Title:** Publications of the Florida Historical Society.
- **Alternative Title:** Florida Historical Society Quarterly.
- **Alternative Title:** Quarterly Periodical of the Florida Historical Society.

- **Notes on title changes:** The Florida Historical Quarterly, volume 15, number 4 (April 1937)-; The Florida Historical Society Quarterly, volume 3, number 3 (January 1925)-volume 15, number 3 (January 1937); Publications of the Florida Historical Society, volume 1, number 1 (April 1908)-volume 3, number 2 (October 1924).

Serial Record for Florida Historical Quarterly in FL Islandora (cont.)


- **Related Title:** Quarterly Periodical of the Florida Historical Society.
Publication of Archival Library & Museum Materials
<http://palmm.fcla.edu/fhq/>
- **Related Title:** The Florida Historical Quarterly.
University of Central Florida Libraries Catalog
<http://ucf.catalog.fcla.edu/permalink.jsp?29CF026020948>
- **Related Title:** The Florida Historical Society Quarterly.
University of Central Florida Libraries Catalog
<http://ucf.catalog.fcla.edu/permalink.jsp?29CF026020982>
- **Related Title:** Publications of the Florida Historical Society.
University of Central Florida Libraries Catalog
<http://ucf.catalog.fcla.edu/permalink.jsp?29CF026021355>

Linking a Collection Level Catalog Record to the Finding Aid

○ Collection Level Record in Library Catalog (Cont.)

- 555 0 |a Finding aid available in the University Archives and on its World Wide Web site.
- 524 |a Cite as: Harrison "Buzz" Price Papers, Special Collections and University Archives, University of Central Florida, Orlando, Florida.
- 600 10 |a Price, Harrison.
- 650 0 |a Amusement parks |x Design and construction.
- 650 0 |a Amusement parks |x Economic aspects |z United States.
- 650 0 |a Tourism.
- 650 0 |a Exhibitions.
- 651 0 |a Disneyland (Calif.)
- 651 0 |a Walt Disney World (Fla.)
- 856 42 |u
<http://library.ucf.edu/specialcollections/Collections/ManuscriptsPrice.php> |3 finding aid (work).
- NCO |a I
- SYS 033206285

Linking a CONTENTdm Record to the Finding Aid and the Collection Level Catalog Record

Title	<u>New York World's Fair 1964-1965, Space Allocation Plan</u>
Subject	<u>1964-1965 New York World's Fair, Disney</u>
Description	<u>Plan printed by Clarke and Rapuano on January 23, 1962. Scale 1" = 200'</u>
Creator	Harrison Price Company
Publisher	<u>New York World's Fair Corporation</u>
Date Original	<u>1961-06-01</u>
Type	<u>Text; Reports</u>
Format	<u>Map</u>
Identifier	<u>DP0016101</u>
Language	<u>English</u>
Rights	Copyright University of Central Florida Special Collections. Permission to publish must be obtained from Special Collections in writing. Contact (407) 823-2576 or online at <u>http://library.ucf.edu/SpecialCollections/</u>
Tag	<u>DP0016101</u>
Number of pages	1 page
Size	<u>85cm. x 88 cm.</u>
Repository	<u>University of Central Florida Libraries, Special Collections & University Archives</u>
Repository Collection	<u>Harrison Buzz Price Papers</u>
Digital Publisher	Electronically reproduced by the Digital Services unit of the University of Central Florida Libraries, Orlando, 2015.
Digital Reproduction Specifications	PDF pages were derived from no less than 400 dpi tiff images.
Date Contributed	<u>2015-01</u>
 Is Referenced By	<u>http://library.ucf.edu/specialcollections/Collections/ManuscriptsPrice.php</u> (University of Central Florida Special Collections Harrison "Buzz" Price Papers finding aid); <u>http://ucf.catalog.fcla.edu/permalink.jsp?29CF033206285</u> (University of Central Florida Libraries Online Catalog)

EAD Finding Aid Describing the Harrison "Buzz" Price Papers

- **Guide to the Harrison "Buzz" Price Papers (Series IV Only), 1952-2006**

<http://library.ucf.edu/SpecialCollections/findingaids/PriceSeries4.xml>

- **Descriptive Summary**

- **Creator** The materials were created by Harrison A. Price

- **Title** Harrison "Buzz" Price Papers

- **Dates** 1952-2006

- **Extent** 139 boxes, 136.25 linear feet

- **Abstract** Harrison "Buzz" Price (1921-2010) was an economics consultant for the themed entertainment and attractions business...

- **Language:** The materials are written in English

- **Accession Number** CFM2003_12

- **Repository** Special Collections & University Archives, University of Central Florida Libraries...

- **Biographical Note**

- **Collection Scope and Content**

- **Restrictions**

- **Selected Subjects and Access Points**

- **Related Material**

- **Administrative Information**

- **Contents List**

Final Thoughts

- RDA is not tied to any particular metadata schema. It is compatible with DC, MODS, and DACS, generally speaking, but there are disjunction in semantics, variations in vocabularies and differences in conventions and practices among these standards;
- DC, MODS and DACS have been undergoing changes to accommodate RDA;
- RDA covers all types of content and media, especially digital resources;
- RDA provides a rich set of guidelines and instructions on recording data to support resource discovery, which can be widely applied in describing digital collections in content and asset management systems.

Final Thoughts (Cont.)

- Challenges in Applying RDA in Cataloging Digital Collections in CMS/DAMS:
 - There is not much literature or examples available on applying RDA to CMS/DAMS which uses DC, MODS, and EAD as its metadata standards and schemas;
 - Getting the brain to think of RDA outside of the MARC structure;
 - Limitations in applying RDA due to the nature of the other metadata standards/schema which are less granular than MARC, and the system restrictions.

Works Referenced

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Questions?

Thank you!