

**Music Library Association (MLA)/  
 Online Audiovisual Catalogers (OLAC)  
 RDA Test Group  
 Discussion Summary Part 2:  
 Unresolved Issues for Further Investigation, Discussion and Follow-Up  
 5/20/11**

This section contains summaries of discussions of issues that came up during the MLA/OLAC RDA Test Group’s participation in the U.S. national libraries’ official RDA test, which we were not able to resolve or about which we did not reach a consensus. These are issues that we think need further investigation and for which we may want to make rule change requests or create best practices. This document summarizes the MLA/OLAC testers’ informal discussions and does not constitute the formal position of either MLA or OLAC nor do all individual test participants necessarily agree with all the points made.

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## **MLA/OLAC test participants**

### ***Test participants***

Marcia Barrett (OLAC), University of Alabama  
Nicholas Bennyhoff (OLAC), Lewis & Clark Library System  
    Vince Andrzejewski (OLAC), Lewis & Clark Library System  
    Edie Elliott (OLAC), Lewis & Clark Library System  
    Cheri Schuler-Faust (OLAC), Lewis & Clark Library System  
Linda Blair (MLA), Eastman School of Music  
Robert Bothmann (OLAC), Minnesota State University, Mankato.  
Sarah Cohen (MLA), Allen Music Library, Florida State University  
    Keith Knop (MLA), Allen Music Library, Florida State University  
Grace Fitzgerald (MLA), University of Iowa  
Jean Harden (MLA), Univ. of North Texas Music Library  
    Ralph Hartsock (MLA), Univ. of North Texas Music Library  
    Mark McKnight (MLA), Univ. of North Texas Music Library  
Jeannette Ho (OLAC), Texas A&M University  
Mary Huismann (MLA), University of Minnesota  
    Kristen Bergland (MLA), University of Minnesota  
Damian Iseminger (MLA), New England Conservatory of Music  
Darcy J. Nebergall (OLAC), King County Library System  
Anchalee (Joy) Panigabutra-Roberts (OLAC), University of Nebraska-Lincoln  
Karen Peters (MLA), UC Santa Barbara  
Alan Ringwood (MLA), University of Texas at Austin  
    Marjie Lawrence (MLA), University of Texas at Austin  
Dana Tonkonow (OLAC), Central Connecticut State University  
Hermine Vermeij (MLA), UCLA  
Susan Wynne (OLAC), University of Wyoming

### ***Consultants***

Robert Freeborn (OLAC), Penn State University  
Kathy Glennan (MLA), University of Maryland  
Kelley McGrath (OLAC), University of Oregon (coordinator)  
Mark Scharff (MLA), Washington University in St. Louis

### ***Testers from other sites who participated in the OLAC/MLA wiki and discussion list***

Felecia Clifton (OLAC), University of North Dakota  
Greta de Groat (OLAC), Stanford University  
Nancy Lorimer (MLA), Stanford University  
Jennifer Eustis (OLAC), Northeastern University  
Karen Griggs (OLAC), Brigham Young University  
Marian Kelley (OLAC), Emory University

## **AACR2 1.1.G.1: predominant parts of items lacking collective titles**

It appears that RDA treats something with multiple works as a collection needing

1. a collective title (RDA 2.3.2.6) or
2. all part titles in 245 (RDA 2.3.2.9)

### RDA 2.3.2.6 Collective Title and Titles of Individual Contents

When preparing a comprehensive description for a resource that has a source of information for the title proper bearing both a collective title and the titles of individual contents within the resource, record the collective title as the title proper

### RDA 2.3.2.9 Resource Lacking a Collective Title

When preparing a comprehensive description for a resource that lacks a collective title, record the titles proper of the parts as they appear on the source of information for the resource as a whole.

If the sources of information identifying the individual parts are being treated as a collective source of information for the resource as a whole (see 2.1.2), record the titles proper of the parts in the order in which they appear in the resource.

Alternative: Devise a title applying the instructions given under 2.3.2.11.

If the titles of individual parts that are not recorded as titles proper are considered to be important, record them as the titles proper of related manifestations (see 27.1).

### RDA 2.1.2.2 Resource Issued as a Single Unit

When preparing a comprehensive description for a resource issued as a single unit (e.g., a textbook in one volume), choose a source of information identifying the resource as a whole.

If there is no source of information identifying the resource as a whole (e.g., a single videodisc containing multiple feature films but with no source of information identifying the resource as a whole), treat the sources of information identifying its individual contents as a collective source of information for the resource as a whole.

AACR2 1.1G1 authorized cataloging the main work and noting the other titles or contents.

AACR2 1.1G1

If, in an item lacking a collective title, one work is the predominant part, treat the title of that work as the title proper and name the other work(s) in a contents note.

Many DVDs are issued with what is clearly a main work, along with a variety of ephemeral, usually untitled, extras such as behind the scenes, photo galleries, trailers, interviews, deleted scenes, etc. These DVDs have separate title frames for both the main and subsidiary features, which means that there is not a single preferred source of information or collective title frame.

It would be difficult to cram all the information about all of these features into 245 and would be confusing to patrons.

Alternatively, one could interpret the disc label title (or possibly container title), which usually represents the main work, as a collective title. One could then transcribe all the titles and statements of responsibility in the 505. This is difficult to do with many extras, as they are often untitled. Some DVDs come with separately produced or released works or works that are not connected with the main work and that may have substantial bibliographic information if one chooses to look.

LC was also unable to identify an equivalent to AACR2 1.1G1 and summarized our choices as “to transcribe all that you have, treat one as a collective title even though it isn't (probably not an attractive choice), devise a title, or create analytic records for the parts (probably not an attractive choice on a regular basis). “

This has undesirable consequences for records in that what are often already long records become even more confusing and information that users are seeking about main works becomes less prominent.

## **What sources are considered “part of the resource itself?”**

RDA is somewhat unclear in how it decides whether accompanying material or non-integral containers are considered part of the resource.

### ***2.2.2.1 Preferred Source of Information, General Guidelines***

Use as the preferred source of information a source forming part of the resource itself that is appropriate to:

- a) the type of description (see 2.1)
- and
- b) the presentation format of the resource (see 2.2.2.2—2.2.2.4).

When choosing a preferred source of information, treat both the **storage medium (e.g., paper, tape, film)** and **any housing (e.g., a cassette, a cartridge) that is an integral part of the resource** as part of the resource itself.

Treat **accompanying material** as part of the resource itself when describing the resource as a whole using a *comprehensive description*. When preparing an *analytical description* of one or more components of a resource, treat **accompanying material** as a source outside the resource itself (i.e., as a related resource).

Treat a **container such as a box in which a game or kit is issued** as part of the resource itself. Treat a **container that is not issued as part of the resource (e.g., a box or case made by the owner)** as a source outside the resource itself.

#### ***2.2.4 Other Sources of Information***

If information required to identify the resource does not appear on a source forming part of the resource itself (see 2.2.2.1), take it from one of the following sources (in order of preference):

- a) accompanying material (e.g., a leaflet, an "about" file)
- b) a container that is not issued as part of the resource itself (e.g., a box, case made by the owner)
- c) other published descriptions of the resource
- d) any other available source (e.g., a reference source).

If information taken from a source outside the resource itself is supplied in any of the elements listed below, indicate that fact either by means of a note or by some other means (e.g., through coding or the use of square brackets).

## *Analysis*

Our interpretation of the intended treatment of accompanying material and containers that are not integral to the resource is laid out in the following table, along with suggestions for improving clarity.

	Part of the resource itself (2.2.2.1)	Outside the resource itself; comes under other sources of info that need to be bracketed (2.2.4)
Accompanying material	When describing the resource as a whole using a comprehensive description	When preparing an analytical description of one or more components of a resource  **2.2.4 does not repeat the qualification and makes it sound as if all accompanying material is outside the resource
Container	a container such as a box in which a game or kit is issued  ** RDA is probably trying to say that commercial CD and DVD containers are part of the resource, but they fail to make this clear by using extreme examples where the container is often the only viable source	a container that is not issued as part of the resource (e.g., a box or case made by the owner)

This section is related to a deferred issue concerning sources of information and collective titles, which MLA and OLAC have agreed to work on (reproduced below).

RDA 2.2.4 says to use “a label bearing a title that is permanently printed on or affixed to the resource, excluding accompanying textual material or a container (e.g., a label on an audio CD or a model)” or embedded metadata, which seems to privilege the disc label. It goes on to say that if that fails “use as the preferred source of information another source forming part of the resource itself, giving preference to sources in which the information is formally presented.” This presumably could include the container, but perhaps not if there is any sort of information on the disc itself? RDA 2.3.2.6 seems to suggest that catalogers can prefer a collective title on the disc, but it is very hard to put these scattered instructions together to form a coherent decision-making process.



## ***Preferred source of information and collective title [p. 3]***

Current RDA instruction number: 2.2.2

From 5JSC/RDA/Full draft/ALA response:

2.2.2: add an instruction dealing with cases in which the application of the instructions would lead to a preferred source of information that only gives the titles of individual contents but no collective title, whereas another source (such as a container) does give a collective title. Preference should be given to a source that gives a collective title.

2.2.4: There is an apparent conflict with categories a) and b) in that 2.2.2.1 states that accompanying material and containers **are** a part of the resource. In the case of containers, the present instruction introduces the concept of whether or not the container is “an integral part of the resource” which was not present in 2.2.2.1. We would prefer not to make this distinction, but to treat all containers the same. If accompanying material and containers are retained in 2.2.4, we suggest that the latter be given the higher priority. This is based on current practice for describing sound recordings, where the box for a compact disc would be given preference over the accompanying program notes; we anticipate that this order of preference would also work for other types of material.

At the March 2009 meeting the JSC agreed to defer consideration until after the first release (Lines 140 and 150). ([http://www.rda-jsc.org/docs/6JSC\\_Sec\\_1\\_ALA\\_response.pdf](http://www.rda-jsc.org/docs/6JSC_Sec_1_ALA_response.pdf))

## **Video games, computer multimedia and content type**

RDA implies that video games should be considered moving images.

### 2.2.2.3 Resources Consisting of Moving Images

If the resource consists of moving images (e.g., a film reel, a videodisc, a *video game*, an MPEG video file)...

It does not appear to address computer multimedia. The use of two-dimensional moving image as a catch-all content type for video and computer games and computer multimedia is not entirely satisfactory. It is unlikely that users will easily recognize these materials if we identify them as moving images in result sets. The content, media, carrier combination for an online video and an online video game will be exactly the same in RDA; there would be nothing that would distinguish them for patrons in an icon or other display based on this combination.

However, there are no obvious alternatives within the types of options provided by RDA. In AACR2, video games and computer multimedia were given the general material designation of electronic resource based on carrier so they were not categorized by content. The AACR2 general material designation of game, like a number of the GMDs, does not form a mutually-exclusive category nor is it easy to create a rigorous definition that can be consistently applied.

In RDA, form of work can be used for identification purposes and some sort of genre-form term for searching purposes, but these may not be available to patrons at an early enough stage in the process of assessing results to be useful.

If we do use two-dimensional moving image as the content type for these materials, what are the implications? Should we do the following in MARC, as we would for other moving image material on a computer carrier?

008/type: g

006/type: m

006/:file: c

007: for computer and video?

In the OLAC sample record, we used both two-dimensional moving image and computer program as content types. RDA defines a computer program as “content expressed through digitally encoded instructions intended to be processed and performed by a computer. Includes operating systems, applications software, etc.” Is computer program appropriate here? If we use both content types, is one dominant? Would we be better off presenting these materials, counterintuitive as it may seem, as computer programs?

It does not seem useful to include a number of other elements that normally apply to moving images, such as aspect ratio and duration.

## **300 field: carrier terms and technical details**

Several issues related to the 300 field came up during the test. These include the choice of term for carrier in 300\$a and where to put technical details.

### ***MARC-RDA mapping***

The relevant portions of the MARC-RDA mapping from appendix D2 are summarized below.

RDA 7.17 Colour Content is only mapped to 538. It does not seem to be mapped to 300\$b, which presumably was an oversight.

It is unclear to us why video characteristics (RDA 3.18) are mapped to 300\$a (extent), but encoding format (RDA 3.19.3) is mapped to 300\$b (other physical details) when it seems likely that patrons will perceive the information they contain as similar. For example, VHS (a video characteristic) maps to 300\$a, but DVD video (an encoding format) maps to 300\$b.

The mapping for video characteristics is also unclear. The label is given as video characteristics (RDA 3.18), which would encompass video format (3.18.2) and broadcast standard (3.18.3). However, the rule number is given as 3.18.3 for broadcast standard. We have provisionally interpreted the label (video characteristics) as being correct since otherwise there is nowhere to map video format (3.18.2).

MARC	RDA
256 \$a Computer file characteristics	3.19.2 File Type
256 \$a Computer file characteristics	3.19.4 File Size
256 \$a Computer file characteristics	3.4 Extent
300 \$a Extent	3.4 Extent
300 \$a Extent	3.18.3 Video Characteristic (3.18.2 video format; 3.18.3 broadcast standard)
300 \$a Extent	3.19.4 File Size
300 \$a Extent	7.22 Duration
300 \$b Other physical details	3.16 Sound Characteristic
300 \$b Other physical details	3.17 Projection Characteristic of Motion Picture Film
300 \$b Other physical details	3.19.3 Encoding Format
300 \$b Other physical details	7.18 Sound Content
538 \$a System details note	3.16.9 Special Playback Characteristic
538 \$a System details note	3.18.3 Video Characteristic (3.18.2 video format; 3.18.3 broadcast standard)
538 \$a System details note	3.19.3 Encoding Format
538 \$a System details note	3.19.5 Resolution
538 \$a System details note	3.19.6 Regional Encoding
538 \$a System details note	3.19.7 Transmission Speed
538 \$a System details note	3.2 Equipment or System Requirement
538 \$a General note	3.16.2 Type of Recording
538 \$a General note	3.16.3 Recording Medium
538 \$a General note	3.16.4 Playing Speed
538 \$a General note	3.16.5 Groove Characteristic
538 \$a General note	3.16.6 Track Configuration
538 \$a General note	3.16.7 Tape Configuration
538 \$a General note	3.16.8 Configuration of Playback Channels
538 \$a General note	3.17 Projection Characteristic of Motion Picture Film
538 \$a General note	7.17 Colour Content
538 \$a General note	7.19 Aspect Ratio

### ***Definition of encoding format***

Part of the problem with recording technical information for audiovisual and direct access electronic materials is that some of the things in the list of encoding formats at RDA 3.19.3 are not like the others. In addition, some common types of technical information that are important to users are not explicitly accounted for here or anywhere else in RDA so far as we can determine.

An encoding format is defined as “a schema, standard, etc., used to encode the digital content of a resource.” Most of the things listed are formats for encoding specific types of data. However, one of the terms refers to a physical type of disc (Blu-ray) and one to a method of recording data on a disc (DVD-R). It is likely that these terms were carried over from current practice in an AACR2 context where the lack of separate elements for these details leads to them all being entered and displayed in the 538 as if they were the same type of information.

If these are to be included, it should be made clear that they are not mutually exclusive with the other categories (e.g., a DVD-R may contain DVD video content, DVD audio content, or be a DVD data disc). In addition, missing categories should be added, e.g., additional types of recorded discs, such as the generic “recorded DVD,” CD-R, DVD+R, and Blu-ray application formats, such as Blu-ray audio and data discs (often called BD-ROM).

Finally, RDA provides no guidance on recording certain types of technical information that are important to users for identification and selection. This includes operating systems (Windows, Mac OS, Linux, etc.) and gaming platforms (Xbox, Playstation, Nintendo DS, etc.) There also appears to be no clear way to record the type of disc (CD, DVD, Blu-ray) for direct access electronic resources if using the controlled list of carrier terms in 300\$a. It is possible to put operating system, gaming platform or the need for a DVD-ROM drive in 538, but these are not accounted for in separate elements despite their importance to users. RDA also does not include elements for the types of audio encoding used on DVD videos, such as Dolby digital or LPCM.

It also seems odd that RDA established the term as Blu-Ray, when the developers of the format do not capitalize the “r” and call it Blu-ray (<http://www.blu-raydisc.com/en.html>).

What follows is an explication of three types of information associated with disc-based digital media.

### Physical types of discs and data storage media formats

Images that show the physical differences between the pits on Blu-ray, DVD and CD may be found at: <http://www.blu-raydisc.com/en/about/WhatisBlu-rayDisc/BDvsDVD.html>.

Disc type	Storage capacity	Read mechanism
<b>CD</b> <a href="http://en.wikipedia.org/wiki/Compact_Disc">http://en.wikipedia.org/wiki/Compact_Disc</a> <a href="http://en.wikipedia.org/wiki/CD-ROM">http://en.wikipedia.org/wiki/CD-ROM</a>	Up to 700 MB	780 nm wavelength semiconductor laser, 1200 Kb/s (1x)
<b>DVD</b> <a href="http://en.wikipedia.org/wiki/Dvd">http://en.wikipedia.org/wiki/Dvd</a>	4.7 GB (single-sided, single-layer)	650 nm laser, 10.5 Mbit/s (1x)
<b>Blu-Ray</b> <a href="http://en.wikipedia.org/wiki/Blu-ray_Disc">http://en.wikipedia.org/wiki/Blu-ray_Disc</a>	25 GB (single-layer)	405 nm laser: 1x @ 36 Mbit/s (4.5 MByte/s)

## Methods for physically recording data on discs

Method	Description	Known as
<b>Replication</b> (press, stamp) <a href="http://en.wikipedia.org/wiki/Replication_%28optical_media%29">http://en.wikipedia.org/wiki/Replication_%28optical_media%29</a>	This is a method of mass-producing digital optical discs using a glass master. This is only economical for larger commercial runs.	DVD-ROM CD-ROM BD-ROM (note that these terms are also used for data discs that hold content such as that described in the right hand column of the next table)
<b>Duplication</b> (burn, record) <a href="http://en.wikipedia.org/wiki/Optical_disc_authoring">http://en.wikipedia.org/wiki/Optical_disc_authoring</a>	These discs are produced by burning content onto a recordable disc (e.g., CD-R or DVD-RW) on a computer using the CD/DVD drive. This method is commonly used for smaller runs.	Recorded DVD/CD/Blu-Ray DVD-R, DVD+R, DVD-RW, etc. Includes variations for all types of discs

## Methods for encoding content on discs (application and file formats)

This is the section that most closely corresponds to RDA's encoding format. In some ways the break between audio carriers like CDs and computer carriers like MP3 is artificial and the more logical divide is between analog and digital. Even things like CD audio and DVD video require a computer and software for interpretation; they're just more standardized and hidden from the end user. Conversely, it is possible to stream digital Internet-based moving image content to stand-alone players.

The second column in the table below contains application formats, which can be defined as follows:

- OLAC DVD guide: "describes what kind of data (software, video or music) is stored, how it is encoded, and how it can be played"
- DVD Demystified book "a specification for storing information in a particular way to enable a particular use."

The third column contains file formats, which generally require some sort of separate software tool to be usable.

	Examples of application (content) formats tied to a specific disc type; these usually work with a specialized stand-alone player, as well as on a computer with appropriate software	Data content (file) formats not tied to a specific type of disc; generally need a computer and software to interact with these file types, although, for example, some CD players will play CDs of MP3 files. In library cataloging, these discs have often been referred to generically as CD-ROM, DVD-ROM or BD-ROM regardless of the method used to record data on the disc.
<b>Audio</b>	CD-DA (Digital Audio) Enhanced CD DVD-Audio Blu-ray Audio	MP3, AAC, WMA, WAV,
<b>Video</b>	Video CD DVD-video Blu-Ray video *	QuickTime, Adobe Flash (FLV),
<b>Other data</b>		HTML, PDF, txt, JPEG, etc.

\*We were unable to find references to Blu-ray video as an application format, but are unsure what else to usefully call this category. There are Blu-ray data discs that are used for video games and data storage, as well as a Blu-ray audio format. “The BD-ROM specification defines four Blu-ray Disc player profiles, including an audio-only player profile (BD-Audio) that does not require video decoding or BD-J.” ([http://en.wikipedia.org/wiki/Blu-ray\\_Disc](http://en.wikipedia.org/wiki/Blu-ray_Disc)). Only a small number of Blu-ray audio discs have been released.

Wikipedia mentions two formats associated with video content on Blu-Ray discs.

- BDAV or BD-AV (Blu-ray Disc Audio/Visual) – a consumer-oriented Blu-ray video format used for audio/video recording (defined in 2002). This appears to be used mostly by end users, for example, when recording on BD-R or BD-RE media using a Blu-ray Disc recorder.
- BDMV or BD-MV (Blu-ray Disc Movie) – a Blu-ray video format with menu support commonly used for movie releases.

BDAV refers to either the transport stream format used for all Blu-ray content, or the plain format intended for home video with no interactivity.

The BDAV Container format is based on the standard MPEG-2 TS (transport stream) Both Blu-ray and HD DVD use transport streams, compared to DVD's program streams, to store video, audio, and other streams. This allows multiple

video programs to be stored in the same file so they can be played back simultaneously, giving a Picture In Picture effect.

The BDAV disc format is the consumer oriented alternative to the BDMV discs made by professional Authoring houses for movie releases. Although early Blu-ray players were released with Firmware allowing playback of non-AACS encrypted content on BDMV discs, current Blu-ray specifications will result in that feature being removed, and BDAV discs being the only unencrypted Blu-ray format supported on players.

BDAV was designed in part to provide compatibility between AVCHD digital camcorders and Blu-ray players. It's comparable to the DVD formats used for standalone DVD recorders, DVD+VR and DVD-VR because it's designed primarily for authoring simple Video/Audio content with no menus.

(<http://www.afterdawn.com/glossary/term.cfm/bdav>)

Blu-ray allows two basic formats for titles. BD titles authored with menu support are in the BD-MV (Blu-ray Disc Movie) format. BD-MV discs contain audio, video, and other streams in Blu-ray's BD-AV (MPEG-2 TS) Container. In addition, BD-MV discs normally include interactive menus using BD-J (Blu-ray's Java implementation). BD-MV is the format intended to replace standard definition DVD. (<http://www.afterdawn.com/glossary/term.cfm/bd-mv>)

For end users, it would seem to be sufficient to identify a disc as carrier Blu-ray video content intended to be playable in a stand-alone player.

Interestingly, ISBD Consolidated ([http://www.ifla.org/files/cataloguing/isbd/isbd-cons\\_2007-en.pdf](http://www.ifla.org/files/cataloguing/isbd/isbd-cons_2007-en.pdf)) lists specific material designations such as

- DVD-Audio
- DVD-Data
- DVD-RW
- DVD-RAM
- DVD-Video

under electronic resource, plus plain DVD under sound recording and DVD-Audio, DVD-ROM, and DVD-Video under videorecording. This still seems a little confused between application formats and recording methods, but does cover the application formats for data, video and audio.

## *Examples*

### **Moving image examples**

The examples on the following page represent our best attempts to describe four scenarios involving moving image materials using four options for recording physical description and technical specifications currently or potentially provided by RDA and the MARC 21 format. The options represented include

1. Controlled carrier terminology in 300\$a; technical information in 538 notes; physical description in 500 notes
2. Conventional terminology in 300\$a; technical information in 538 notes; physical description in 500 notes
3. Controlled carrier terminology in 300\$a; technical information in 300\$a and 300\$b, physical description in 500 notes
4. Controlled carrier terminology in 300\$a; technical information in the new fields proposed by MARC discussion paper 2011-DP04v (<http://www.loc.gov/marc/marbi/2011/2011-dp04.html>), physical description in 500 notes

Options 1 and 2 are generally in current use in AACR2 cataloging. Some group members felt that option 3, with additional information in 300, is likely to be more helpful to users because important information appears earlier in the record and in a more condensed and visually-connected form. However, it does squeeze a lot of information into 300.

There was some concern about the display of the proposed new MARC fields in option 4. If they don't display adjacent to the 300, it seems unlikely that they will be much more helpful than information in 538 for users visually scanning records. However, we appreciate the advantages of cleanly recording these elements in a machine-manipulable way. One group member favored defining new 300 subfields over new 3xx fields for this purpose.

In the end, none of these options is entirely satisfactory for display or manipulation. In many ways, a tabular display of these specifications would be more helpful for patrons. Although the proposed 3xx fields are an improvement for computer manipulation, they are not completely effective in situations where a single record describes more than one format.



Comparison of options for recording physical description and technical details for moving images

Similar to AACR2, using the controlled list for carriers	Similar to AACR2, using conventional terminology for carriers	Using the controlled list for carriers and including additional technical information in 300	Using the controlled list for carriers and the new fields in MARC discussion paper 2011-DP04
300 1 videodisc (120 min.) : \$b sound, color ; \$c 4 3/4 in. 538 DVD; NTSC. 500 Dolby digital 5.1; wide screen (1.78:1).	300 1 DVD-video (120 min.) : \$b sound, color ; \$c 4 3/4 in. 538 NTSC. 500 Dolby digital 5.1; wide screen (1.78:1).	300 1 videodisc (NTSC, 120 min.) : \$b DVD video, sound, color ; \$c 4 3/4 in. 500 Dolby digital 5.1; wide screen (1.78:1).	346 \$b NTSC 347 \$b DVD video 300 1 videodisc (120 min.) : \$b sound, color ; \$c 4 3/4 in. 500 Dolby digital 5.1; wide screen (1.78:1).
300 1 videodisc (142 min.) : \$b sound, color ; \$c 4 3/4 in. 538 DVD-R; PAL; region 2. 500 Dolby digital 5.1 or DTS 5.1; wide screen (1.66:1).	300 1 DVD-R (142 min.) : \$b sound, color ; \$c 4 3/4 in. 538 PAL; region 2. 500 Dolby digital 5.1 or DTS 5.1; wide screen (1.66:1).	300 1 videodisc (PAL, 142 min.) : \$b DVD-R, sound, color ; \$c 4 3/4 in.** 538 Region 2. 500 Dolby digital 5.1 or DTS 5.1; wide screen (1.66:1).	346 \$b PAL 347 \$b DVD-R \$e Region 2 300 1 videodisc (142 min.) : \$b sound, color ; \$c 4 3/4 in. 500 Dolby digital 5.1 or DTS 5.1; wide screen (1.66:1).
300 1 videodisc (156 min.) : \$b sound, color ; \$c 4 3/4 in. 538 Blu-ray; region A. 500 Dolby digital 2.0; full screen (1.33:1).	300 1 Blu-ray disc (156 min.) : \$b sound, color ; \$c 4 3/4 in. 538 Region A. 500 Dolby digital 2.0; full screen (1.33:1).	300 1 videodisc (156 min.) : \$b Blu-ray , sound, color ; \$c 4 3/4 in. 538 Region A. 500 Dolby digital 2.0; full screen (1.33:1).	347 \$b Blu-ray \$e Region A 300 1 videodisc (156 min.) : \$b sound, color ; \$c 4 3/4 in. 500 Dolby digital 2.0; full screen (1.33:1).
300 1 videocassette (30 min.) : \$b sound, color ; \$c 1/2 in. 538 VHS; NTSC. 500 Stereo; full screen (1.33:1); original aspect ratio 1.85:1.	300 1 videocassette (30 min.) : \$b sound, color ; \$c 1/2 in. 538 VHS; NTSC. 500 Stereo; full screen (1.33:1); original aspect ratio 1.85:1.	300 1 videocassette (VHS, NTSC, 30 min.) : \$b sound, color ; \$c 1/2 in. 500 Stereo; full screen (1.33:1); original aspect ratio 1.85:1.	346 VHS \$b NTSC 300 1 videocassette (30 min.) : \$b sound, color ; \$c 1/2 in. 500 Stereo; full screen (1.33:1); original aspect ratio 1.85:1.

\*\*Alternative possibilities for the third column of the second row of examples:

- (1) 300 1 videodisc (PAL, 142 min.) : \$b DVD-R, DVD video, sound, color ; \$c 4 3/4 in. OR (2) 300 1 DVD-R (PAL, 142 min.) : \$b DVD video, sound, color ; \$c 4 3/4 in. OR (3) 300 1 videodisc (PAL, 142 min.) : \$b DVD video, sound, color ; \$c 4 3/4 in. + 538 DVD-R

## Direct access electronic resource examples

The examples on the following two pages represent our best attempts to describe five scenarios involving direct access electronic resources using five options for recording physical description and technical specifications currently or potentially provided by RDA and the MARC21 format. The options represented include

1. Controlled carrier terminology in 300\$a; technical information in 538 notes; physical description in 500 notes
2. Conventional terminology in 300\$a; technical information in 538 notes; physical description in 500 notes
3. Controlled carrier terminology in 300\$a; technical information in 300\$a and 300\$b, physical description in 500 notes
4. Conventional terminology in 300\$a; technical information in 300\$a and 300\$b, physical description in 500 notes
5. Controlled carrier terminology in 300\$a; technical information in the new fields proposed by MARC discussion paper 2011-DP04v (<http://www.loc.gov/marc/marbi/2011/2011-dp04.html>), physical description in 500 notes

Options 1-4 are in current use in AACR2, with 1-2 being more common for information such as gaming platform (Xbox) and 3-4 for file formats such as JPEG.

As discussed earlier, it is not clear to us that things like CD-ROM are encoding formats. They are types of discs, which are associated with certain encoding formats. It does not appear that RDA accommodates information about disc type anywhere except in the conventional terminology for carrier option in 300\$a or in the 538 note, where it has generally been given as an indirect statement about the type of drive needed (e.g., 24x CD-ROM drive).

It is also not clear whether things like Xbox or Playstation are encoding formats. They seem more like platforms or operating systems. If RDA does consider them to be encoding formats, would it also be useful to put information about operating systems, such as Windows or Mac OS in 300\$b since that's also used as a differentiating characteristic by patrons.

Of the first four options, group members generally preferred option 4 (conventional terminology in 300\$a with technical details in 300\$b) for direct access electronic resources. However, concern was expressed about lack of guidance or consensus on selecting conventional terms. If conventional terminology is preferred, it was seen as desirable to have an authorized list to refer to. Should an audio CD be called CD, CD audio, audio CD or compact disc in 300\$a? Is 1 Blu-ray disc useful when some are videos and some are video games? Some video game discs (e.g., Xbox discs) don't state whether they are DVD-ROMs or CD-ROMs.

One commentator wondered whether, since RDA considers video games to be moving image content, they should be given video carriers. Although to the patron, a game console probably

appears as much of a black box as a stand-alone DVD player, it probably makes sense to continue to treat video games as more similar to computer games and moving image content, such as QuickTime videos, on a computer platform.

Comparison of options for recording physical description and technical details for direct access electronic resources

<b>Similar to AACR2, using the controlled list for carriers</b>	<b>Similar to AACR2, using conventional terminology for carriers</b>	<b>Using the controlled list for carriers and including additional technical information in 300</b>	<b>Using conventional terminology and including additional technical information in 300</b>	<b>Using conventional terminology and the new fields in MARC discussion paper2011-DP04</b>
<p><i>[language learning software]</i>                      300 1 computer disc : \$b sound, color ; \$c 4 3/4 in.                       538 Pentium 4 or higher; Windows XP or Vista... microphone; DVD-ROM drive.</p>	<p>300 1 DVD-ROM : \$b sound, color ; \$c 4 3/4 in.                       538 Pentium 4 or higher; Windows XP or Vista... microphone.</p>	<p>300 1 computer disc : \$b DVD-ROM, sound, color ; \$c 4 3/4 in.                       538 Pentium 4 or higher; Windows XP or Vista... microphone.</p>	<p>300 1 DVD-ROM : \$b sound, color ; \$c 4 3/4 in.                       538 Pentium 4 or higher; Windows XP or Vista... microphone.</p>	<p>300 1 DVD-ROM : \$b sound, color ; \$c 4 3/4 in.                       538 Pentium 4 or higher; Windows XP or Vista... microphone.</p>
<p>256 Image file [unsure if this field should start with a capital; seems to have fallen out of favor in AACR2 cataloging]                       300 2 computer discs : \$b color ; \$c 4 3/4 in.                       538 Windows or Macintosh OS; CD-ROM drive.                       538 JPEG files. [this seems odd, but it's the non 300\$b mapping or this info]</p>	<p>256 Image file                       300 2 CD-ROMs : \$b color ; \$c 4 3/4 in.                       538 Windows or Macintosh OS.                       538 JPEG files.</p>	<p>256 Image file                       300 2 computer discs : \$b CD-ROM, JPEG, color ; \$c 4 3/4 in.                       538 Windows or Macintosh OS.</p>	<p>256 Image file                       300 2 CD-ROMs : \$b JPEG, color ; \$c 4 3/4 in.                       538 Windows or Macintosh OS.</p>	<p>347 \$a Image file \$b JPEG                       300 2 CD-ROMs : \$b color ; \$c 4 3/4 in.                       538 Windows or Macintosh OS.</p>

Similar to AACR2, using the controlled list for carriers	Similar to AACR2, using conventional terminology for carriers	Using the controlled list for carriers and including additional technical information in 300	Using conventional terminology and including additional technical information in 300	Using conventional terminology and the new fields in MARC discussion paper2011-DP04
<p>[video instruction] 256 video file</p> <p>300 7 computer discs : \$b sound, color ; \$c 4 3/4 in.</p> <p>538 Intel Pentium 4 2.0 GHz processor ... Windows XP or Vista; QuickTime 7.1 or later ... DVD-ROM drive.</p>	<p>256 video file</p> <p>300 7 DVD-ROMs : \$b sound, color ; \$c 4 3/4 in.</p> <p>538 Intel Pentium 4 2.0 GHz processor ... Windows XP or Vista; QuickTime 7.1 or later ... DVD-ROM drive.</p>	<p>256 video file</p> <p>300 7 computer discs : \$b DVD-ROM, Quicktime, sound, color ; \$c 4 3/4 in.</p> <p>538 Intel Pentium 4 2.0 GHz processor ... Windows XP or Vista; QuickTime 7.1 or later ... DVD-ROM drive.</p>	<p>256 video file</p> <p>300 7 DVD-ROMs : \$b Quicktime, sound, color ; \$c 4 3/4 in.</p> <p>538 Intel Pentium 4 2.0 GHz processor ... Windows XP or Vista; QuickTime 7.1 or later ... DVD-ROM drive.</p>	<p>347 video file \$b Quicktime</p> <p>300 7 DVD-ROMs : \$b sound, color ; \$c 4 3/4 in.</p> <p>538 Intel Pentium 4 2.0 GHz processor ... Windows XP or Vista; QuickTime 7.1 or later ... DVD-ROM drive.</p>
<p>300 1 computer disc : \$b sound, color ; \$c 4 3/4 in.</p> <p>538 Xbox 360 with NTSC designation; 4 MB memory... DVD-ROM drive. ?? DVD-ROM drive seems odd for a game??</p>	<p>300 1 DVD-ROM : \$b sound, color ; \$c 4 3/4 in.</p> <p>538 Xbox 360 with NTSC designation; 4 MB memory...</p>	<p>300 1 computer disc : \$b DVD-ROM, Xbox 360, sound, color ; \$c 4 3/4 in.</p> <p>538 NTSC designation; 4 MB memory...</p>	<p>300 1 DVD-ROM : \$b Xbox 360, sound, color ; \$c 4 3/4 in.</p> <p>538 NTSC designation; 4 MB memory...</p>	<p>346 NTSC</p> <p>300 1 DVD-ROM : \$b Xbox 360, sound, color ; \$c 4 3/4 in.</p> <p>538 4 MB memory...</p>
<p>300 1 computer disc : \$b sound, color; \$c 4 3/4 in.</p> <p>538 PlayStation 3; Blu-ray disc.</p>	<p>300 1 BD-ROM : \$b sound, color; \$c 4 3/4 in.</p> <p>538 PlayStation 3.</p>	<p>300 1 computer disc : \$b Blu-Ray, PlayStation 3, sound, color; \$c 4 3/4 in.</p>	<p>300 1 BD-ROM : \$b PlayStation 3, sound, color; \$c 4 3/4 in.</p>	<p>300 1 BD-ROM : \$b PlayStation 3, sound, color; \$c 4 3/4 in.</p>

## Audio resource examples

There is a general consensus that recording 1.4 m/s playing speed (RDA 3.16.4.4) is not necessary for ordinary audio CDs or DVD-A discs since it is not important for identification or selection. Some also think that digital as type of recording (RDA 3.16.2) is unnecessary for a compact disc since they're all digital and the element is not core. In addition, if one uses a conventional term for extent, such as compact disc, recording CD audio as encoding format (RDA 3.19.3.3) is redundant.

The 500 note of "Compact disc" that was used in AACR2 cataloging is not included in RDA.

### Options for recording physical description and technical details for audio resources

Using the controlled list for carriers and including additional technical information in 300	Using conventional terminology and including additional technical information in 300	Using controlled terms and the new fields in MARC discussion paper 2011-DP04
300 1 audio disc (75 min.) : \$b CD audio, stereo ; \$c 4 3/4 in.	300 1 compact disc (75 min.) : \$b stereo ; \$c 4 3/4 in.	344 digital \$c 1.4 m/s \$g stereo 347 \$b CD audio  300 1 audio disc (75 min.) ; \$c 4 3/4 in.
300 1 audio disc (66 min.) : \$b DVD audio ; \$c 4 3/4 in.	300 1 DVD disc (66 min.) : \$b DVD audio ; \$c 4 3/4 in.	344 digital 347 \$b DVD audio  300 1 audio disc (66 min.) ; \$c 4 3/4 in.
300 1 audio disc (72 min.) : \$b digital, stereo, surround, CD audio, SACD ; \$c 4 3/4 in.  538 Hybrid SACD playable on SACD and CD players; multichannel 5.1 or stereo sound. [Do I need to repeat multichannel 5.1 in 538 to give the complete info or is surround in 300 sufficient?]	300 1 hybrid SACD (72 min.) : \$b digital, stereo, surround ; \$c 4 3/4 in.	344 digital \$g stereo \$g surround 347 \$b SACD \$b CD audio  300 1 audio disc ; \$c 4 3/4 in.  538 Hybrid SACD playable on SACD and CD players.
300 1 [don't see anything in the controlled list for DualDiscs] : \$b stereo, CD audio, DVD video, color, sound ; \$c 4 3/4 in.  538 Hybrid CD/DVD-video disc. NTSC, all region.	300 1 DualDisc (NTSC) : \$b stereo, CD audio, DVD video, color, sound ; \$c 4 3/4 in.  538 Hybrid CD/DVD-video disc. All region.	344 digital \$g stereo 346 \$b NTSC \$e All region 347 \$b CD audio \$b DVD video  300 1 DualDisc : \$b color, sound ; \$c 4 3/4 in.

## ***General comments***

This section includes a couple of general comments not covered in the examples sections above.

## **Order of terms**

RDA does not provide any guidance on the order of terms, either for qualify information, such as video characteristics and time, in 300\$a or for information in 300\$b. ISBD Consolidated gives the following order for 300\$b:

- Material of which the resource is composed
- Presence of illustrations
- Presence of color (color characteristics)
- Reduction ratio (microforms)
- Presence or absence of sound
- Other technical specifications (includes playing speed, number of sound channels)

This suggests that some information that we have been instinctively giving at the beginning of 300\$b due to perceived importance, such as DVD video or PDF, should instead go at the end.

## **Use of conventional terminology**

There was some disagreement in the group about when it is appropriate or desirable to use conventional terminology. RDA 3.4.1.5 gives some options for using a term in common usage rather than a term from the controlled list under RDA 3.3.1.3.

### RDA 3.4.1.5 Other Terms Used to Designate the Type of Unit

Use a term in common usage (including a trade name, if applicable) to designate the type of unit:

- a) if the carrier is in a newly developed format that is not yet covered in the list under 3.3.1.3
- b) if none of the terms listed under 3.3.1.3 is appropriate

or

- c) as an alternative to a term listed under 3.3.1.3, if preferred by the agency preparing the description.

### EXAMPLE

audio slide

USB flash drive

...

If a trade name or other similar specification is not used as a term designating the type of unit, record that information as instructed under 3.20.1.3.

The LCPS for this rule says to “apply cataloger’s judgment about using a new term if an appropriate term is not in the list under 3.3.1.3,” which implies that catalogers should only use a term in common usage when none of the terms from 3.3.1.3 fit. Some of our group preferred this approach and emphasized the importance of standardized vocabulary. Others thought that terms in common usage would be more patron-friendly, especially if a set of terms could be agreed upon. One potential method for mitigating the lack of vocabulary control when using terms in common usage would be to map those terms to the standardized terms. However, some terms in common usage, such as DVD, are inherently ambiguous and would be problematic.

In general, there seems to be the most support for terms in common usage for direct access electronic resources and the least for audio resources with moving images occupying an intermediate position.

## **300\$e and accompanying material**

RDA does not provide an option to record accompanying material in the brief, carrier-focused form that AACR2 currently puts in 300\$e. In RDA Appendix D.2, 300\$e is mapped to 27.1 Related Manifestation. However, the reverse mapping from Related Manifestation is to 500, 501, 505, various other 500 notes, 740 and some 7xx linking fields, but not 300\$e.

RDA 27.1 provides three options for describing related manifestations. These are

1. Identifier (Issued with: ISBN 978-0-7575-4388-3)
2. Structured description (Contains: v. 1. Status, distribution, and taxonomy (xvii, 848 pages : 1 map)...) )
3. Unstructured description (Includes petition to the King from the citizens of London, 1783, in scroll form)

None of these options is suitable for much material that accompanies audiovisual materials. These accompanying materials usually do not have their own identifiers nor do they have separate titles. It is important to inform patrons that these exist, but there is often little useful information to record beyond a brief description of the item. The current practice of giving a short name for the category of material plus additional physical description information when desired seems economical and adequate.

LCPS 3.1.4 provides some additional options, but the problem ultimately needs to be resolved in RDA. The LCPS options read in part

1. If a detailed description of the carrier characteristics of the accompanying material is desired, record the extent (see RDA 3.4), and other characteristics applicable to the accompanying material (see RDA 3.5-3.19). Provide this information as either:

- a) a separate additional MARC field 300 in the bibliographic record



300 ## \$a [carrier information for main part]  
300 ## \$a 1 map : \$b color ; \$c 25 x 35 cm

b) an accompanying material subfield (\$e) added to MARC field 300 of the main part  
300 ## \$a [carrier information for main part] + \$e 2 audio discs : digital ; 4 3/4 in.

2. If a detailed description of the carrier characteristics of the accompanying material is not necessary, record the extent (only) as either:

a) a separate additional MARC field 300 in the bibliographic record

300 ## \$a [carrier information for main part]  
300 ## \$a 1 map

b) an accompanying material subfield (\$e) added to MARC field 300 of the main part

300 ## \$a [carrier information for main part] + \$e 1 USB flash drive

LCPS 3.1.4 also discusses note-based options.

Assuming that we can record accompanying material in 300\$e, we had some questions about how to reconcile the terms currently used in 300\$e with chapter 3 of RDA. Chapter 3 provides a controlled vocabulary for carriers. Right now catalogers often record a descriptive word such as booklet or user guide in 300\$e, especially when dealing with print accompanying material.

RDA 3.1.4.1 provides the option to give just carrier or just carrier and extent when describing multiple carriers. Although RDA does not make this explicit, presumably a cataloger could choose to give more detail about the primary carrier and less about accompanying or subsidiary containers. RDA 3.3.1.3 gives the relevant carrier term of "volume." However, RDA 3.4.5.2 says to record extent for single volume in terms of pages, leaves, etc., unless the item is unpaginated.

Does this leave us with something like

300 1 DVD-video (76 min.; 20 min.) : \$b digital, sound, black and white and color ; \$c 4 3/4 in. + \$e 23 pages

Even "+ 1 volume (23 pages)" if it were permitted, seems much less user-friendly than "+ 1 booklet (23 pages)." RDA 3.4.1.5 permits the use of a term in common usage "as an alternative to a term listed under 3.3.1.3 if preferred by the agency preparing the description." This could justify the use of the term booklet, but not the placement in \$e.

During the testing period, LC advised us to continue following existing practice, but this issue needs to be resolved within RDA.

## 33x elements and multiple values

RDA makes no provision for bundling carrier, media and content (33x) elements when there is more than one set needed for a given bibliographic description. There is also no way to connect 33x elements describing multiple carries in MARC in a machine-interpretable way. This means that for items with accompanying materials or with multiple material types, it is difficult or impossible to automatically generate icons or patron-friendly terms for 33x groupings since a computer cannot reliably identify which terms are related.

There seem to be two options for representing multiple groupings of 33x fields in MARC.

### *Repeating \$a*

For a book with an accompanying music CD.

```
336 $a text $a performed music $2 rdacontent
337 $a unmediated $a audio $2 rdamedia
338 $a volume $a audio disc $2 rdacarrier
```

This approach has the advantage of being more amenable to computer interpretation. If no gaps are left (i.e., each element of each group of three is made explicit by repetition if necessary) as in the following example, a computer could put the pieces back together based on position.

```
336 $a performed music $a still image $a text $a notated music $a text $2 rdacontent
337 $a computer $a computer $a computer $a unmediated $a unmediated $2 rdamedia
338 $a computer disc $a computer disc $a computer disc $a volume $a volume $2
rdacarrier
```

This could be parsed as a computer disc with performed music, still images and text, accompanied by a booklet with text and notated music. Without the redundancy, as shown below, it would not be interpretable by a computer (nor by a human without the rest of the description).

```
336 $a performed music $a still image $a text $a notated music $2 rdacontent
337 $a computer $a unmediated $2 rdamedia
338 $a computer disc $a volume $2 rdacarrier
```

### *Repeating 33x fields with \$3*

The use of \$3 in this example provides a more human-friendly display, although its helpfulness is reduced slightly by the fact that most software re-orders the fields in numerical order. Potentially a computer could put these back together based on \$3, but the process would be more complex than a process based on position alone and more error-prone due to the likelihood of typographical errors.

336 \$3 book: \$a text \$2 rdacontent  
336 \$3 compact disc: \$a performed music \$2 rdacontent  
337 \$3 book: \$a unmediated \$2 rdamedia  
337 \$3 compact disc: \$a audio \$2 rdamedia  
338 \$3 book: \$a volume \$2 rdacarrier  
338 \$3 compact disc: \$a audio disc \$2 rdacarrier

It may be useful to repeat information in multiple instances of the same field order to provide a comprehensive description of all parts. In the following example, two-dimension moving image content is recorded in both 336 fields.

336 \$3 DVD-ROMs: \$a two-dimensional moving image \$a still image \$a text \$2  
rdacontent  
336 \$3 DVD video: \$a two-dimensional moving image \$2 rdacontent  
337 \$3 DVD-ROMs: \$a computer \$2 rdamedia  
337 \$3 DVD video: \$a video \$2 rdamedia  
338 \$3 DVD-ROMs: \$a computer disc \$2 rdacarrier  
338 \$3 DVD video: \$a videodisc \$2 rdacarrier

In theory, linking subfield \$8 could also be used to bring these groupings together. As with \$3, \$8 does not seem to have been implemented by any systems. It is also hard for catalogers to input directly and does not result in a useful display without system support.

## Computer as Media Type

We need more flexibility and contemporary terminology at RDA 3.2 and 3.3 for electronic media. While 3.2 clearly states that adjectival medium term “is a categorization reflecting the general type of intermediation device required to view, play, run, etc., the content of a resource,” the sole option of “computer” severely limits current technology. The term itself, “computer,” is not generally equivalent to the other terms at RDA 3.2 listed in table 3.1. We can generally use any of the terms in table 3.1, except “computer,” and say something is that word: it is audio, it is video, it is projected, it is microscopic, etc. To say something “is computer” simply does not work descriptively or grammatically. A medium is not “computer.” A medium is “electronic” or “digital.” In point of fact, RDA demonstrates this at RDA 3.3 by using the modifier “computer” for all of the tangible electronic resource carriers. Computer is typically a noun and tends to be specific to either desktop/laptop personal machines or large “servers”. The technology used by computers is referred to as digital or electronic. While “video” can be used as a noun, it is typically an adjective and is often used to represent the technology used for creating moving images. “Audio” is similar but less so than “video.”

It seems more accurate to replace the RDA 3.2 term “computer” with “digital” or possibly “electronic.” The term “digital” fits better with the other terms in the list of possible media, and is truer to the definition of “medium” as the mechanism for delivery. We often speak of

digital media or electronic media in everyday language, so extending the common usage that happens to be more accurate would make sense.

In the list at RDA 3.3 we see a long list of carriers bearing the adjective “computer” plus the term “online resource.” Files on the many types of devices not listed would presumably come under the unhelpfully generic “other computer carrier.” Another approach might be to call all e-resource carriers something—say “electronic” for now—and, when needed, qualify it with the storage device (e.g., CD-ROM, flashdrive).

There is a proliferation of electronic devices on a continuum from full-fledged, multi-purpose computers to smart phones to focused devices like game consoles, ebook readers and MP3 players to devices like Playaways that are hard-coded to do only one thing. Some digital file types that have traditionally required a computer to be usable no longer require a full-fledged, multi-purpose computer. For example, streaming videos can now be played on some stand-alone DVD players connected to a television and some stand-alone CD players will play discs of MP3 files. All electronic materials require some sort of computer intermediation, but those, such as audio CDs and DVD videos, that play on fairly standardized, mass-produced stand-alone players, have traditionally not been treated as computer resources by the cataloging rules. However, there are encoding decisions that producers make when creating DVD videos that sometimes interact negatively with the capabilities of either stand-alone players or software players. DVD videos from small publishers are subject to the same kinds of compatibility and functional problems from unskilled and idiosyncratic programming as educational CD-ROMs from small publishers. It is increasingly less clear where, or if, the cataloging rules should draw a line between what people generally think of as electronic devices or players and what they think of as computer.

It is unclear to us how to catalog a CD-ROM containing MP3 files. In the AACR2 world, LC made a decision that all MP3 files are to be considered electronic resources (<http://www.loc.gov/catdir/cpsol/soundrec.pdf>). If this decision carries over to RDA, it suggests that any device containing MP3 files would be considered an electronic or computer carrier. However, the relevant RDA media type definitions say:

- Audio: Media used to store recorded sound, designed for use with a playback device such as a turntable, audiocassette player, CD player, or MP3 player. Includes media used to store digitally encoded as well as analog sound.
- Computer: Media used to store electronic files, designed for use with a computer. Includes media that are accessed remotely through file servers as well as direct-access media such as computer tapes and discs.

This would suggest

336 performed music \$2 rdacontent

337 audio \$2 rdamedia

338 audio disc \$2 rdacarrier  
300 1 audio disc (55 min.) : \$b digital, MP3 ; \$c 4 3/4 in.

Rather than (assuming computer resources can have times)

336 performed music \$2 rdacontent  
337 computer \$2 rdamedia  
338 computer disc \$2 rdacarrier  
300 1 computer disc [or 1 CD-ROM] (55 min.) : \$b sd., MP3 ; \$c 4 3/4 in.

But for an online MP3 file the medium would presumably have to be computer-mediated because it's an online resource?

336 performed music \$2 rdacontent  
337 computer \$2 rdamedia  
338 online resource \$2 rdacarrier  
300 1 online resource (55 min.) : \$b MP3 ; \$c 4 3/4 in.

Catalogers are unclear how to catalog material on portable electronic devices or the portable electronic devices themselves. Devices such as ebook readers and tablet computers are increasingly being acquired and circulated by libraries. In some cases, these materials are valued for their pre-loaded content, such as ebooks or audio files. In some cases, these materials are circulated as tools for patrons to use for their own purposes.

We could also argue that "online resource" does not define a carrier, but rather an amorphous, poorly defined concept that may or may not have something to do with an actual online connection. A carrier for a digital or electronic object or collection of objects is a data file. We could also be more specific and use "Web site" as the carrier for the majority of any integrating resources, as a Web site is a collection of digital data files. There are certainly several other terms that could be used for digital objects that would have more meaning to users and be more accurate in their meaning and context. To call the carrier for a digital image or a digital map or an electronic text an "online resource" does not serve the spirit of the RDA purposes of identification or selection. RDA should flesh out the terms for electronic resources to encourage more accurate and more user-friendly terminology.

## **Relationship designators for related works, expressions, manifestations, items (\$i)**

LCPS 1.7.1 says, "When subfield \$i for relationship designator is used, it is the first subfield, the first word is capitalized, and the subfield ends with a colon." In the examples at <http://www.loc.gov/marc/bibliographic/bdx00.html>, the entity level designation (work, expression, etc.) is included in \$i, although it may be stripped for display to end users.

The following would seem to be a work-to-work relationship rather than a manifestation-to-work relationship. In current cataloging there does not seem to be a place to record it in the authority record so it has to go in the bib record.

700 1 \$i Libretto based on (work): \$a Bond, C. G. \$q (Christopher Godfrey), \$d 1945- \$t Sweeney Todd.

In this example, the note gives additional information that is not currently available from the access point, but the access point makes the relationship more machine-comprehensible.

500 Based on the chorale Vom Himmel hoch by Martin Luther.  
7001 \$i Based on (work) \$a Luther, Martin, \$d 1483-1546. \$t Vom Himmel hoch da komm ich her.

Is the following correct usage for a music CD of Slap that Bass from the movie "Shall we Dance"?

730 \$i contained in (work): \$a Shall we dance (Motion picture : 1937)

Should the following be an expression relationship?

245 Concise history of western music / \$c Barbara Russano Hanning.  
250 Third edition.  
700 \$i Based on (expression): \$a Burkholder, J. Peter \$q (James Peter) \$t History of western music. \$s Seventh edition.

Is the following a work or expression relationship?

245 Spiritus est Deus : \$b John 4:24 : Motet for soprano, alto, strings & basso continuo / \$c Pasquale Anfossi  
730 \$i Musical setting of (work): \$a Bible. \$p John, IV, 24. \$l Latin. \$s Vulgate.

For a volume in the collected works of Paganini, is it necessary to include the relationship designator "In series (work)" in the 800 field or does the presence of the 490 field takes care of this?

490 Edizione nazionale delle opere di Niccolò Paganini ; \$v v. 10  
800 Paganini, Nicolò, \$d 1782-1840. \$t Works. \$f 1976 ; \$v v. 10.

LCPS 0.12 says

In some instances, MARC content designation (e.g., field, indicator, coding) will satisfy some RDA elements and relationships. For example, the use of second

indicator "2" in a 7XX field means that the appendix J relationship designator "Contains (work)" should not be given.

Some of our group preferred the use of the more explicit relationship designator in §i.

What relationship designator should be used to say that a CD was previously issued as an LP? There is "also issued as" but that implies that the publications are concurrent. Should there just be a note without an access point?

Is "reproduced from holograph" a related manifestation relationship?

## **Relationship designators for roles of people, corporate bodies, etc. (§e relator terms)**

### ***Publisher, creator and other roles defined as elements***

These roles are not listed in Appendix I because they are defined separately as elements or relationships in chapter 6. Publishers are commonly traced on records for audiovisual materials.

John Attig thinks that these "element-level relationships -- which also include Creator, Contributor, Producer of an unpublished resource, Distributor, Manufacturer, Owner, and Custodian -- can be used as relationship designators, particular when encoding in MARC." (<http://www.mail-archive.com/rda-l@listserv.lac-bac.gc.ca/msg04333.html>).

This needs to be clarified.

### ***Unknown roles***

In some cases, the relationship of an individual to a bibliographic item is unknown or not easily determined. Should the relationship designator be skipped or should a general category, such as creator, be used?

The example in our practice record set is a CD-ROM that supports teaching the play *Romeo and Juliet*. The CD-ROM contain production photographs with on-screen questions, recordings of key moments, teachers' notes and lesson ideas, and student worksheets. It also includes tools that allow students to record their own speeches, annotate the images and create their own storyboards. The statement of responsibility is simply Rob Smith. What is his role—creator or editor of some sort? Should role simply be omitted?

### ***Roles not in list***

There are two legitimate options here. Relationship designators are not required and could be omitted. Alternatively, RDA I.1 says "If none of the terms listed in this appendix is appropriate or sufficiently specific, use a term indicating the nature of the relationship as concisely as possible." For example, in one of our records "§e screen story creator" was used.

What are the implications of using non-controlled terms for consistency in browsing or faceting? Will there be a proliferation of these terms that undermines their use as a controlled vocabulary? Should there be some place to compile standard roles beyond those listed in RDA? Do we also need some way to use cross-references to bring together similar or same roles that go by different names?

Is it preferable to use no relationship designator rather than use one from outside RDA's controlled vocabulary?

### ***Roles we'd like to see in the list***

Relator terms that we looked for and couldn't find something appropriate include:

- Writers of introductions. "Writer of added commentary" seems to imply a commentary running parallel to a text.
- Developers of computer games
- Readers of audiobooks. "Narrator" doesn't quite fit since it is defined as "reading or speaking in order to give an account of an act, occurrence, course of events, etc." "Speaker" is not very specific and the examples Appendix I gives are for a lecture or a speech, which are pretty far removed from reading the text of a book aloud.
- A term for the relationship between a conference and its proceedings. Although we were not able to come up with a short pithy phrase, this is a common relationship.
- Curators of an exhibition when cataloging an exhibition catalog

### ***Relationship designators and name-title added entries***

There was some discussion about whether it is appropriate or useful to include relationship designators in name-title added entries, such as

700 12 Anonymous, Joe, \$d 1927- \$e *author*. \$t Title.

RDA does not mandate the inclusion of relationship designators. Creators of name-title added entry works may perform various functions, such as author, composer or compiler. It could be argued that name-title added entries represent works that should be linked with relationships between group 1 entities (Appendix J) and that the relationship between the creator and work should be defined in that related record. In practice, current systems do not have the ability to make those links and names in name-title added entries do double-duty as creator access points and as parts of work access points.

Not including relationship designators for creator roles in name-title added entries will create an inconsistent file. Many catalogers are adding relationship designators to creators in 100 fields in records with 100/240 combinations. 100/240 pairings are analogous to name-title added entries except that they are coded in separate MARC fields. In catalogs which are able to combine both types of name-title entries in a single browse list, not including relationship designators in 700\$a\$t will lead to an inconsistent file. In addition, second and third composers



on a work or film music composers on movie records, whose names are not associated with titles in their access points, will receive a relationship designator in situations where a primary composer on a music compilation CD will not.

It is, however, unclear whether systems will be able to accommodate the interpolation of a relationship designator in the middle of an access point. This may be a problem for validation routines and it may lead to entries not properly interfiling with entries created under AACR2. Users may also find it visually confusing.

This problem is primarily related to existing systems and the MARC format rather than RDA.

### ***Specificity of relationship designators***

Is the following useful or proper?

700 Cranshaw, Bob, \$d 1932- \$e performer, \$e instrumentalist.

One institution is experimenting with this in order to be able to collect data both on performers as a whole, and performers restricted to "type." They also hope to be able to offer hierarchical access in their discovery system. Will the hierarchy in Appendix I eventually be expressed in some machine-comprehensible way?

### ***Film director, television director or just director***

As was the case with LC Genre-Form Terms, many in the moving image cataloging community believe that splitting lists based on original release format is not helpful to users in most cases. That information should be in another part of the record. RDA is inconsistent in the levels of splitting it provides for various relationships, which range from a single level for "editor of moving image work" to three levels (motion picture, television and video) for adaptations.

In Appendix I:

Screenwriter (one option for all formats; subset of author under creator)

Director (general option with two specific options for moving images plus radio director; under other entities associated with a work)

film director

television director

The structure for producer is parallel to that for director

editor of moving image work (one option for all formats; under contributors to expressions)

In Appendix J:

based on (work)

- adaptation of (work)
  - motion picture adaptation of (work)
  - television adaptation of (work)
  - video adaptation of (work)
  - screenplay based on (work)
    - motion picture screenplay based on (work)
    - television screenplay based on (work)
    - video screenplay based on (work)

Here there are three levels given, film, television and video. There is a general relationship for screenplay, but the general relationship for a moving image rolls up into the general adaptation category.

It may be desirable for moving image catalogers to agree to use the more general terms in order to avoid fragmentation of functionally equivalent roles.

### ***Order of relationship designators***

Is there a preferred order when using more than one relationship designator? One participant's institution uses alphabetical order for \$4 so they will index together if they are ever indexed in a left-anchored search.

### ***Use of relator codes (\$4)***

Prior to RDA, most music and moving image catalogers used relator codes in \$4 rather than \$e relator terms. RDA does not govern display. However, not all of the RDA relationship terms appear to be defined as MARC relator codes (e.g., film director, on-screen presenter). Are there advantages to staying with \$4 relator codes, especially for institutions with legacy data? Relator codes are a controlled list and OCLC validates them in Connexion so there's no possibility of using a misspelled code as there would be with a relator term. On the other hand, the codes are inflexible if you want to include a function that is not included in the MARC relator code list. The codes also require software to transform them into human-readable terms. WorldCat in FirstSearch does this, but we are not aware of any other system that currently has this capability.

## **Creators and contributors to moving image materials**

### ***Statements of responsibility: what and where?***

#### **How many statements of responsibility in 245\$c?**

It would be helpful to establish best practices for what statements of responsibility to record for moving images and where to record them.

In RDA, only the first statement of responsibility is required. LC's "Elements to be included" (at [http://www.loc.gov/catdir/cps0/RDAtest/LC\\_RDA\\_coreelements.doc](http://www.loc.gov/catdir/cps0/RDAtest/LC_RDA_coreelements.doc)) concurs "Yes (if more than one, only the first recorded is required)."

RDA 2.4.2 Statement of Responsibility Relating to Title Proper  
CORE ELEMENT

If more than one statement of responsibility relating to title proper appears on the source of information, only the first recorded is required.

RDA 2.4.1.6 More Than One Statement of Responsibility

If there is more than one statement of responsibility, record the statements in the order indicated by the sequence, layout, or typography of the source of information from which the associated title, designation of edition, designation of a named revision of an edition, title of a series, or title of a subseries is taken. If the sequence, layout, and typography are ambiguous or insufficient to determine the order, record the statements in the order that makes the most sense.

If statements of responsibility appear in sources other than the source from which the associated title, designation of edition, designation of a named revision of an edition, title of a series, or title of a subseries is taken, record them in the order that makes the most sense.

This does not imply that catalogers are limited to recording only the first statement of responsibility. However, the first statement of responsibility on the title frames of a video is usually a corporate body, often in the form of so-and-so “presents,” and not necessarily the most important statement of responsibility to record. Therefore, if a cataloger chooses to record only the first statement of responsibility for a moving image, it will often not be the most useful or important one.

### **What functions in 245\$c vs. 508?**

RDA 2.4.1.1 Scope [of statement of responsibility]

A statement of responsibility is a statement relating to the identification and/or function of any persons, families, or corporate bodies responsible for the creation of, or contributing to the realization of, the intellectual or artistic content of a resource.

...

For statements identifying performers of music whose participation is confined to performance, execution, or interpretation, see 7.23.

For statements identifying performers, narrators, and/or presenters in a motion picture or video recording, see 7.23.

For statements identifying persons who have contributed to the artistic and/or technical production of a motion picture or video recording, see 7.24.

RDA 2.4.2.3 Recording Statements of Responsibility Relating to Title Proper (245\$c)

Record statements of responsibility relating to title proper applying the basic instructions on recording statements of responsibility given under 2.4.1.

*If not all statements of responsibility appearing on the source or sources of information are being recorded, give preference to those identifying creators of the intellectual or artistic content. In case of doubt, record the first statement.*

RDA 7.23.1.1 Scope (511)

A performer, narrator, and/or presenter is a person, family, or corporate body responsible for performing, narrating, and/or presenting a work.

RDA 7.23.1.3 Recording Performers, Narrators, and/or Presenters

*Record the names of performers, narrators, and/or presenters, if they are considered to be important.* For performers of music, indicate the medium in which each performs.

RDA 7.24.1.1 Scope (508)

An artistic and/or technical credit is a listing of persons, families, or corporate bodies making contributions to the artistic and/or technical production of a motion picture or video recording other than as performers, narrators, or presenters.

RDA 7.24.1.3 Recording Artistic and/or Technical Credits

Record the names of persons, families, or corporate bodies who have contributed to the artistic and/or technical production of a motion picture or video recording other than as performers, narrators, or presenters. *Do not include the names of assistants, associates, etc., or any other persons making only a minor contribution.* Preface each name or group of names with a statement of function

Although RDA 2.4.2.3 gives only general guidance for choosing which statements of responsibility to record if there are many, it allows catalogers to select only those who are deemed to be “creators of the intellectual or artistic content” or alternatively, just to pick the first-named. However, the moving image-related example given at 2.4.1.6 seems to contradict the example for 7.24.1.3 in terms of which functions are considered to belong in the statement of responsibility and which are considered artistic and/or technical credits.

RDA 2.4.1.6 More Than One Statement of Responsibility [Example]

ABC News  
producer and writer, James Benjamin  
director, Al Niggemeyer

director, Dan Bessie  
writer, Phyllis Harvey  
animation, B. Davis  
editor, I. Dryer

#### RDA 7.24.1.3 Recording Artistic and/or Technical Credits [Examples]

Credits: screenplay, Harold Pinter; music, John Dankworth; camera, Gerry Fisher;  
editor, Reginald Beck

Credits: script, John Taylor; calligraphy and design, Alan Haigh; commentator,  
Derek G. Holroyde

Screenwriters and editors are included in both examples, i.e., in the statement of responsibility and in the artistic/technical credits note.

It was suggested to us by Adam Schiff, and we agree, that the ABC News example at 2.4.1.6 would be more useful with more context, i.e., state what credits were not transcribed in the statement of responsibility, and if it were moved to 2.4.2.3.

There is clearly some overlap between "intellectual or artistic content" (chapter 2 statement of responsibility) and "artistic and/or technical production" (chapter 7 and 508/511 notes). RDA does not define either term except implicitly by example. Best practices or guidelines would be helpful, although some interpretation or judgment will remain necessary.

Stanford University's current RDA guidelines for video catalog present one approach:  
<http://lib.stanford.edu/metadata-department/clone-video-cataloging-guidelines>.

### ***Creators, contributors, works and expressions***

RDA's mapping of functions related to producing moving images to creators, contributor, works and expressions remains opaque to us.

In the JSC-approved moving image example ([http://www.rda-jsc.org/docs/6JSC\\_RDA\\_Complete\\_Examples\\_\(Bibliographic\)\\_revised.pdf](http://www.rda-jsc.org/docs/6JSC_RDA_Complete_Examples_(Bibliographic)_revised.pdf) for *Black Christmas*, the producer and director are given in the statement of responsibility, the screenwriter in artistic/technical credits, and no other non-cast credits are given. Surprisingly for a commercially-produced film, no production company is listed. Despite being relegated to 508, the screenwriter is considered the creator of the film. The producer and director, who appear in the 245\$c statement of responsibility, are considered to be an "other person, family, or corporate body associated with a work."

OLAC noted similar concerns about the moving image example that we submitted to the JSC. "We note for the record the strange case of James Cameron in this example. According to the taxonomy in Appendix I, Cameron is creator, other person associated with the work, and contributor to the expression [in his role as film editor]; we also find it particularly strange that

his role as creator (the only core relationship) relates to his role as author of the screenplay (a limited aspect of the motion picture work), not to his role as director or producer of the entire production. We acknowledge that this is correct according to RDA, but wish you once again to note the frustration of catalogers who find this a very strange and inaccurate representation of reality!" ([http://www.rda-jsc.org/docs/6JSC\\_RDA\\_Complete\\_Examples\\_ALA\\_Rep\\_addendum.pdf](http://www.rda-jsc.org/docs/6JSC_RDA_Complete_Examples_ALA_Rep_addendum.pdf))

In Appendix I, moving image-related relationship designators include:

Relationship Designators for Creators

- Screenwriter (as a subclass of author)
- Filmmaker

Relationship Designators for Other Persons... Associated with a Work

- Director (also specific terms for film and television)
- Director of photography
- Producer (also specific terms for film and television)
- Production company

Relationship Designators for Persons... Associated with an Expression

- Animator
- Art director
- Costume designer
- Editor of a moving image work
- Performer (also specific terms for actors, dancers, narrators, etc.)
- Presenter

It does not make sense to us to associate most or all of the moving image-related functions listed under expression with the expression level. It is true that the people performing those functions generally make a more minor contribution to the moving image work as a whole. However, it is not clear to us that the level of contribution should be mapped to the FRBR group 1 entities such that only those functions playing a major role are mapped to work while functions having a more minor role are mapped to expression. For things that FRBRoo would call "recorded works," such as moving image materials, it is almost impossible to imagine a different expression of a work with a different animator or costume designer.

For collaboratively-created works, such as most moving images, it is very difficult to separate the creation of the work from the realization of the first expression. Although there are usually only one or perhaps a few people whose vision drives a film or television program, the overall creation is the melding of a great many people's input. Since the costume designer contributes to all possible expressions of the work, it seems to make more sense to consider such functions in the category "other persons... associated with the work" and record them more economically with the work rather than redundantly with the expression. The only moving image-related

functions currently listed under expression where there is likely to be a new expression with a different person in that role are editor or an off-screen narrator or voice.

## **Corporate bodies and moving images**

This is a fraught area often without clear answers. Moving image materials often reference many corporate bodies on their packaging and title frames, often with no clear designation of function. This is also related to the question about publisher as a relationship designator since many catalogers make access points for publishers of audiovisual materials.

### ***Major motion pictures***

For contemporary films, the question of who did what is increasingly difficult to discern. The language is vague (e.g., presents, in association with). It also takes more and more companies to “produce” and release a film these days. Sometimes the production company and the distributor are the same.

### ***Educational videos from small publishers***

For educational videos, it is often impossible to tell if a company is just a publisher or distributor or if it is also the production company. These companies are usually listed on the disc label and container and often on frames that have been inserted at the beginning or end of the video. They may omit the names of the original production company completely or only leave it in a form that is not usually used as source for statements of responsibility in library cataloging (e.g., the original copyright holder on the title frames of this sort of video is often the original producer or production company).

### ***Publishers and distributors***

The OLAC group that developed examples for the JSC provisionally proposed identifying corporate bodies recorded in 260 as publishers unless they are explicitly identified as distributors (see discussion about publishers and relationship designators above). For commercially-produced videos, there appears to be little benefit gained from trying to distinguish publishers and distributors unless the distinction is explicitly made on the item.

Further complicating things, there do not seem to be any agreed upon guidelines for identifying the publisher or distributor of a video and practice varies within the A/V cataloging community. Some catalogers use the company listed on the spine of the video container, which seems to be based on established practice for audio CDs. Others take the publisher from the packaging copyright statement. Some videos (e.g., certain European arts-related productions) have so many corporate bodies listed on the container with no obvious precedence that it is seemingly impossible to identify the publisher.

### ***Production companies***

The OLAC group that developed examples for the JSC proposed internally that “companies on the title frame credits be considered production companies unless there is evidence otherwise.” This means those title frames that are integral to the work and not the ones tacked



on at the beginning and end, which are more likely to be distributors or publishers. Films for the Humanities and Sciences often adds these additional frames, as do home video arms of various film companies.

### ***Film distributors***

A film distributor is defined by RDA as

A person, family, or corporate body involved in distributing a moving image manifestation to theatres or other distribution channels.

Film distributors have not normally been distinguished in library cataloging, although they are often recorded in the publication area (260) for archival cataloging. For older films, knowing the distributor may help identify different versions, but this is less likely to be the case for materials commercially distributed for the non-theatrical market. It is not clear how practical it is for most library catalogers to provide this level of detail as it is not necessarily obvious how to make the distinction just from the information on the piece. Although some sources, such as InBaseline or even the Internet Movie Database (IMDb) attempt to provide this information, they are not always consistent.

For example, for the 1997 film *Titanic*, the title frames read “Twentieth Century Fox and Paramount Pictures present a Lightstorm Entertainment production.” InBaseline considers Lightstorm Entertainment to be the production company, Paramount Pictures and 20<sup>th</sup> Century Fox to be studios, and Paramount to be the U.S. theatrical distributor and Paramount Home Video to be the U.S. video distributor. IMDb does not distinguish between studios and production companies. It considers Lightstorm, Paramount and 20<sup>th</sup> Century Fox all to be production companies. IMDb agrees that 20<sup>th</sup> Century Fox is the U.S. theatrical distributor, but goes on to provide a more detailed but inconsistent list of additional theatrical and video distributors.

Company credits from InBaseline for *Titanic* (1997)

Credits	
Company	
Name	Role
<a href="#">Paramount Pictures</a>	Studio (North America)
<a href="#">20th Century Fox</a>	Studio
<a href="#">Paramount Pictures</a>	Domestic Theatrical Distributor (North America)
<a href="#">Gemini Films (France)</a>	Foreign Theatrical Distributor (Russia)
<a href="#">20th Century Fox International</a>	Theatrical Distributor (Argentina, Australia, Austria, Belgium, Brazil, Finland, Germany, Italy, Japan, Singapore, Sweden, Switz CH-D, Switz CH-F, Switz CH-IT, United Kingdom)
<a href="#">20th Century Fox</a>	Foreign Distribution Sales
<a href="#">CTS</a>	Theatrical Distributor (Finland, Netherlands)
<a href="#">Hispano Foxfilms</a>	Theatrical Distributor (Spain)
<a href="#">Paramount Home Entertainment</a>	Domestic Video Distributor
<a href="#">Skifan HF</a>	Theatrical Distributor (Iceland)
<a href="#">UFD</a>	Theatrical Distributor (France)
<a href="#">Col</a>	Theatrical Distributor (Switz CH-D, Switz CH-F, Switz CH-IT)
<a href="#">Lightstorm Entertainment</a>	Production Company

Company credits from IMDb for Titanic (1997) (excerpt)

Production Companies
<ul style="list-style-type: none"> <li>• <a href="#">Twentieth Century Fox Film Corporation</a> (present) (as Twentieth Century Fox)</li> <li>• <a href="#">Paramount Pictures</a> (present)</li> <li>• <a href="#">Lightstorm Entertainment</a></li> </ul>
Distributors
<ul style="list-style-type: none"> <li>• <a href="#">Paramount Pictures</a> (1997) (USA) (theatrical)</li> <li>• <a href="#">20th Century Fox Home Entertainment</a> (1999) (USA) (DVD)</li> <li>• <a href="#">Paramount Home Video</a> (1999) (USA) (VHS)</li> <li>• <a href="#">Paramount Home Video</a> (1999) (USA) (video) (laserdisc)</li> <li>• <a href="#">National Broadcasting Company (NBC)</a> (2000) (USA) (TV) (broadcast premiere)</li> <li>• <a href="#">Paramount Home Video</a> (2001) (USA) (DVD)</li> <li>• <a href="#">20th Century Fox Home Entertainment</a> (2005) (USA) (DVD)</li> </ul>

## Issuing bodies

Since publisher does not appear in Appendix I, one of the group members wondered if the publisher or distributor of a video should be given the relationship designator for issuing body. Issuing body is defined in Appendix I as

A person, family or corporate body *issuing* the work, such as an official organ of the body.

The use of issuing overlaps with one of the verbs in the definition of publisher

A person, family, or corporate body responsible for publishing, releasing, or *issuing* a resource.

“Issuing” is also used in RDA in conjunction with the rule about when corporate bodies can be creators, which specifies a list of categories of works that corporate bodies could be “responsible for originating, issuing, or causing to be issued”. Finally, it appears in RDA 19.3.2 where it describes FRBR group 2 entities associated with legal works, including the issuing agency or agent “(other than a legislative body) responsible for issuing a law.”

It is not entirely clear to us what RDA means by issuing body, but it appears to be more narrowly defined than publisher.

## **Personal name headings where one date is known and the other is a range**

There appears to be no provision for a situation where one birth/death date is known but the other is limited only to a multi-year span. Coprario's dates are given in Grove as b. 1570-80, d. 1626, but instructions are given only for approximate years, one or two years, or a "period of activity," which seems incompatible with birth/death dates. For lack of a better option, the current AACR2 heading, which gives "ca. 1570," has been modified as follows.

Coprario, John, \$d approximately 1570-1626

## **Title proper and preferred title**

In 2.3 RDA says that title proper is a core element. LC's spreadsheet "LC RDA CORE ELEMENTS FOR THE RDA TEST" affirms this and maps it to the 245 field. In 6.2 RDA identifies the preferred title of the work as a core element. LC maps this to the 240 or 130. This would seem to imply that all records require both a title proper in 245 and a uniform title in 1xx/240 or 130. The LCPSs do not appear to address this issue, though LCPS 6.27.1.9 appendix 1 says that motion pictures wouldn't need a preferred title except for conflicts, additions, not original title, etc. However, that only applies to this one format and also contradicts RDA 6.2.

LC did not create an LCPS for this in order to see what testers would do. According to LC, the inclusion of a 240 or a 130 doesn't necessarily mean that an authority record is required. That's an administrative decision.

What are the implications of continuing the existing practice of having 245\$a do double-duty as both title proper and preferred title when the title proper is the same as the preferred title?

## **Preferred titles for collections with collective titles**

Is it necessary or desirable to create a 130/240 preferred title for the collective title of an aggregate work? If the collective title happens to coincide with the title of one of the works, what sort of qualifiers would you need to distinguish them?

LC's reply: "If there is a single creator, then there might be need for a 240 field per RDA 6.2.2.10. There could be situations when a distinguishing characteristic needs to be added to a

preferred title with the result given in a 130 when the collective title conflicts with the title of another work. And yes, we've had a few situations during our practice sessions this summer when the title of the compilation was the same as the title of one of the works in the compilation; we gave the LC testers the option to add the qualifier to the access point for the 'smaller' work or to give a 130 with a qualifier."

## **Movement titles in musical works**

There are no instructions in RDA for giving the movement titles of a musical work in a contents note. Movement titles are important for identification of some works, such as works generically titled as suites or pieces. They also help users identify parts of works they find cataloged separately. RDA's interpretation that contents notes only apply to "related works" is not helpful in this situation since movement or other subunits are not works in themselves. The BCC Working Group on Work Records for Music (<http://bcc.musiclibraryassoc.org/BCC-Historical/BCC2008/BCC2008WGWRM1.pdf>) stated that movement titles should be included in work records. A best practice document would be helpful here.

## **Titles beginning with opus numbers**

245 Op. 10, Suite in E moll / Şc Hasse, Karl

RDA 2.3.2.8.1 says that

If a music title consists only of the name or names of one or more types of composition, or the name or names of one or more type of composition and one or more of the following: a) medium of performance; b) key; c) date of composition; d) number, treat all the elements together (in the order in which they appear on the source of information) as the title proper.

So, as in the above example, opus number, key, and all that is part of the title proper and should be recorded in the order it appears on the source of information. AACR2 says basically the same thing in 5.1B1, minus the explicit instruction about keeping the order as it is on the manifestation. Music catalogers have been moving statements such as "Op. 10" to somewhere after the start of the title, but there does not seem to be an explicit instruction to do this in AACR2. This may be a custom inherited from earlier rules. Titles beginning with "Op. \_\_\_" are not useful to patrons. Under RDA, is there any way to retain the current practice of moving "Op. \_\_\_" out of this initial position in the title proper even when it appears there on the title page?

## **Preferred title for performed music on moving image materials**

RDA 6.27.1.3 on authorized access points for collaborative works says that "For motion pictures, videos, video games, etc., construct the authorized access point representing the work using the preferred title for the work, formulated according to the instructions given under 6.2.2."

This suggests that the preferred title for these materials should be a 130 title based on the title frames of the moving image. An additional authorized access point for the musical work should be made, usually in 700\$a\$t. Should this be an analytical work (2<sup>nd</sup> indicator 2) or a related work (2<sup>nd</sup> indicator 0)? Should there be subfield i for a relationship and if so, what should it be? Is it desirable to qualify these access points by content type (i.e., two dimensional moving image and performed music respectively)?

## Parallel titles on DVDs

RDA 2.3.3.2 says to “Take parallel titles proper from any source within the resource.” Therefore, it seems kosher to transcribe parallel titles from DVD subtitle tracks in 245\$b.

2.20.2.3 says “If a parallel title proper is taken from a different source than the title proper, make a note on the source of the parallel title proper if it is considered important.” The subtitle tracks in question do appear on the title frames, but are optionally selected by the user and are not a part of the original title frames. It is hard to see the utility of making a note about the source of the parallel title(s) in this situation.

## Title access points for component works in collections

700\$a\$t or 730 access points are needed for the preferred titles of the works in a collection. Are 740 access points also needed for the titles proper on the manifestation? Even if they are the same as the titles proper?

The LCPS for 2.3.6.3 (Recording Variant Titles) says to trace the title of a component work in 740, but seems to imply that it should only be used when for titles that are different from the preferred title in the authorized access point. “Recording a variant title for a component of an aggregate work *in a form other than would be recorded as the authorized access point for that component work*. This form of variant title is recorded in MARC field 740. Note that use of MARC field 740 to record a variant title does not replace the use of an authorized access point for the component.” [emphasis added]

In the following example, a 740 would have been made under AACR2 and would seem to be desirable. On the other hand, the cross-reference is presumably in the authority record and the 740 de-couples the title from the author.

245 10 Sinfonia no. 4 : \$b Vitória ; Concerto no. 5 para piano e orquestra / \$c Heitor Villa-Lobos.  
700 12 Villa-Lobos, Heitor, \$d 1887-1959. \$t Concertos, \$m piano, orchestra, \$n no. 5.  
740 02 Concerto no. 5 para piano e orquestra.

It was also suggested that perhaps 25.1.1.3 (Referencing Related Works) is relevant here.

## Publication status of remote electronic resources

There appears to be no RDA equivalent for AACR2 9.4B2 (consider all remote access electronic resources to be published). This seems to suggest that the decision should be made on a case

by case basis. Since print dissertations have been considered unpublished, should the online versions should also be considered unpublished? Are there any heuristics for making this decision?

## **Publisher of an e-reproduction**

For an ebook on the Ebook Library (EBL) site, should the publisher be

- (1) Artech House Books, which is what the EBL website says. According to RDA this is a legitimate source for publisher information.
- (2) EBL, since it's not clear what role Artech Books played, if any, in the resource's digitization.

If Artech House Books is given as the publisher, should EBL go in the record and if so, where? In the record in question, the cataloger only gave EBL in 500 notes related to dates. It is also implicit in the URL in 856.

## **Copyright place?**

On one of our items, there is a publisher, plus copyright date and place. There is no distribution information. The item says "Printed in U.S.A.," which has been interpreted as a place of manufacture. The place associated with the copyright date is London. In this example, there is a place of manufacture, but some scores only have a place of copyright.

The initial attempt was:

260 [Place of publication not identified] : \$b Boosey & Hawkes, \$c [date of publication not identified] ; \$a [Place of distribution not identified], \$c [date of distribution not identified], \$c ©1942 \$e (U.S.A.).

However, based on slide 50 in LC's third training module, which gives

260 \$a [Place of publication not identified] ; \$b [publisher not identified], \$c 2009 \$e (Arlington, VA : \$f B. Ross Printing)

This could be modified to

260 [Place of publication not identified] : \$b Boosey & Hawkes, \$c [date of publication not identified], \$c ©1942 \$e (U.S.A.).

Slide 44 states that "The Date of distribution is a 'Core if' element if the date of publication is not identified and distribution information is on the resource. However, if you're supplying a probable date of publication (strongly encouraged), you won't be giving this element." However, the omission of distribution elements if they are [... not identified] does not appear to be explicit in RDA. It seems to be an interpretation or clarification by LC.

This could be further simplified by inferring a date of publication from the copyright date and a place of publication from the place of manufacture (see LCPS 2.8.2.6) as follows:

260 [U.S.A.] : \$b Boosey & Hawkes, \$c [1942], \$c ©1942.

Place of copyright is not an RDA element and so perhaps is not considered important for identification and therefore doesn't need to be recorded.

One of us did encounter an RDA record where the copyright holder had been recorded in 260\$c in conjunction with the date. Although the cataloger was presumably transcribing, "taking what you see" does not seem to justify adding extraneous information into a narrowly defined element. On the other hand, for moving images, it can sometimes be valuable to be able to record the copyright holder on the title frames since that is often the only indication of the origin of some programs distributed for the educational market.

## **Copyright and phonogram date**

RDA does not have instructions for situations in which you have both a copyright date and a phonogram date. Should both be included (as follows) or should the AACR2 practice of recording only the phonogram date be carried over?

260 \$c [1984], ©1984, @1984.

## **Contradictory date information**

Some resources present information that seems contradictory. For example a score with an expression date later than its apparent copyright date.

DtSt t/Dates 2003, 1995  
260 \$c [2003?], ©1995.  
500 "1989, revised version 2003"--Title page.

Presumably the score only underwent minor changes. The practical thing seems to be to record the information as it presents itself.

## **Content type for graphic novels**

Should these have two content types: text and still image? Does it matter which comes first?

## **Content type for a memory card game**

It seems that these would best be described as "still image" or perhaps a combination of still image and text.

## Use of 380 (form of work) in bibliographic records

When is it appropriate or helpful to use 380 (form of work) in bibliographic records? How is this different from a note on the nature of content (RDA 7.2 )?

Some examples from the test records where clarification might be helpful

380 Video game

380 Video tutorials [DVD-ROM: “Learn character animation using Blender”]

380 Memory card game [America's national parks, monuments, memorials]

## Order of notes

Unlike AACR2, RDA does not prescribe an order for notes. If catalogers wish to follow a standard order, they will have to look to ISBD for guidance. The 2007 consolidated edition of ISBD (<http://www.ifla.org/publications/international-standard-bibliographic-description>) superseded the separate standards for various formats (<http://www.ifla.org/publications/international-standard-bibliographic-description>). The tables below are based on the consolidated ISBD and the mappings in Appendix D of RDA.

Although RDA maps dissertation notes to MARC 502, dissertation notes do not appear in ISBD. Award notes (MARC 586) also do not appear in ISBD.

RDA maps accessibility content to general notes in ISBD and to both 500 and 546 in MARC. This makes sense as most but not all accessibility content is related to language (e.g., tactile rulers may have no language content). However, the majority of accessibility content is language-related and most accurately mapped to 546.

There was some debate about the mapping of aspect ratio to MARC 500, which seems to be based on the fact that it is more accurately characterized as physical description than as a system requirement. It was included in 538 in AACR2 cataloging based on the fact that AACR2 allowed notes to be combined. Whether and under what circumstances note may be combined in RDA is unclear given RDA’s emphasis on discrete elements.

The following tables give, as best we can determine, the ISBD order for notes commonly associated with audio recording and scores.

### *Audio recordings*

ISBD	RDA	MARC
7.0.3 Notes on system requirements	3.20 Equipment or System Requirement	538
7.1.1.1 Translation note	26.1 Related Expression [translation of]	500/7XX
7.1.1.2 Notes on the source of title proper	2.20.2 Note on title	500
7.1.1.3 Notes giving variant titles	2.3.6 Variant title	500/246



ISBD	RDA	MARC
7.1.2.1 Notes on the musical form and/or medium of performance	7.2 Nature of the Content	500
N/A	7.11 Place and Date of Capture	518
7.1.2.1 Notes on the form and/or medium of performance	7.21 Medium of Performance of Musical Content	500
7.1.2.2 Notes on language	7.12 Language of Content	546
7.1.4 Notes on the statements of responsibility (including staging, instrumentation, etc. of performed works)	2.20.2 Note on Statement of Responsibility	500
7.1.4 Notes on the statements of responsibility (including staging, instrumentation, etc. of performed works)	7.23 Performer, Narrator, and/or Presenter	511
7.2 Notes on the edition area and the bibliographic history of the resource	2.20.4 Note on Edition Statement	500
7.2.4 Notes on relationships to other resources	25.1 Related Work	500/7XX
7.2.4 Notes on relationships to other resources	26.1 Related Expression	500/7XX
7.2.4 Notes on relationships to other resources	27.1 Related Manifestation	500/7XX
7.4 Notes on the publication, production, distribution area	2.20.6 Note on Production Statement	500
7.4 Notes on the publication, production, distribution area	2.20.7 Note on Publication Statement	500
7.4 Notes on the publication, production, distribution area	2.20.8 Note on Distribution Statement	500
7.4 Notes on the publication, production, distribution area	2.20.9 Note on Manufacture Statement	500
7.4 Notes on the publication, production, distribution area	2.20.10 Note on Copyright Date	500
7.5 Notes on the physical description area	3.22.2 Note on Extent of Manifestation	500
7.5 Notes on the physical description area	3.10 Generation	500
7.5 Notes on the physical description area	3.16 Sound Characteristic	500
7.5 Notes on the physical description area	3.22.4 Note on Dimensions of Manifestation	500
7.6 Notes on the series area	2.20.11 Note on Series Statement	500
7.7 Notes relating to the contents	25.1 Related Work (needs clarification)	505/500/504
7.8 Notes on the resource identifier and the terms of availability area	2.15 Identifier for the Manifestation [e.g., music plate and publisher's numbers, ISMN]	500

ISBD	RDA	MARC
7.10.1 Other notes (duration)	7.22 Duration	500/306
7.11 Notes relating to the copy in hand	3.22.3 Note on Extent of Item	590
7.11 Notes relating to the copy in hand	3.21 Item-Specific Carrier Characteristic	590
7.11 Notes relating to the copy in hand	3.22.5 Note in Dimensions of Item	590

### ***Scores***

ISBD	RDA	MARC
7.1.1.1 Translation note	26.1 Related Expression [translation of]	500/7XX
7.1.1.2 Notes on the source of title proper	2.20.2 Note on title	500
7.1.1.3 Notes giving variant titles	2.3.6 Variant title	500/246
7.1.2.1 Notes on the musical form and/or medium of performance	7.2 Nature of the Content	500
7.1.2.1 Notes on the musical form and/or medium of performance	7.21 Medium of Performance of Musical Content	500
7.1.2.2 Notes on language	7.12 Language of Content	546
7.1.4 Notes on the statements of responsibility (including staging, instrumentation, etc. of performed works)	2.20.2 Note on Statement of Responsibility	500
7.2 Notes on the edition area and the bibliographic history of the resource	2.20.4 Note on Edition Statement	500
7.2.4 Notes on relationships to other resources	25.1 Related Work	500/7XX
7.2.4 Notes on relationships to other resources	26.1 Related Expression	500/7XX
7.2.4 Notes on relationships to other resources	27.1 Related Manifestation	500/530/501/7XX
7.4 Notes on the publication, production, distribution area	2.20.6 Note on Production Statement	500
7.4 Notes on the publication, production, distribution area	2.20.7 Note on Publication Statement	500
7.4 Notes on the publication, production, distribution area	2.20.8 Note on Distribution Statement	500
7.4 Notes on the publication, production, distribution area	2.20.9 Note on Manufacture Statement	500
7.4 Notes on the publication, production, distribution area	2.20.10 Note on Copyright Date	500
7.5 Notes on the physical description area	3.22.2 Note on Extent of Manifestation	500
7.5 Notes on the physical description area	3.9 Production Method (e.g., engraved)	500

ISBD	RDA	MARC
7.5 Notes on the physical description area	3.11 Layout (e.g., double-sided, fold-outs [I guess])	500
7.5 Notes on the physical description area	3.22.4 Note on Dimensions of Manifestation	500
7.5 Notes on the physical description area	7.15 Illustrative Content	500
7.6 Notes on the series area	2.20.11 Note on Series Statement	500
7.7 Notes relating to the contents	25.1 Related Work (needs clarification)	505/500/504
7.8 Notes on the resource identifier and the terms of availability area	2.15 Identifier for the Manifestation [e.g., music plate and publisher's numbers, ISMN]	500
7.10.1 Other notes (duration)	7.22 Duration	500/306
7.10.1 Other notes (notation)	7.13.3 Form of Musical Notation	546 \$b
7.11 Notes relating to the copy in hand	3.22.3 Note on Extent of Item	590
7.11 Notes relating to the copy in hand	3.21 Item-Specific Carrier Characteristic	590
7.11 Notes relating to the copy in hand	3.22.5 Note in Dimensions of Item	590

## Notes: combining notes and notes that don't map to RDA elements

AACR2 1.7A5 advises catalogers "When appropriate, combine two or more notes to make one note." There is no equivalent to this rule in RDA and RDA's emphasis on recording separate elements distinctly does not seem to encourage the combination of notes. If notes are combined, RDA provides no guidance on how to do so. This potentially affects some current practices.

In some cases, multiple RDA elements map to a single MARC field and practice seems to be to combine that information in the single field. 538 notes for system requirements are a good example of this. One suggestion for dealing with this was to create multiple 538 fields and preface each field with a subfield \$i to identify what element it is addressing. Some of this technical information can also be mapped to 300\$a or \$b, where it is displayed more prominently, but carries over the same problems in terms of lack of explicit coding. The proposed MARC 3xx fields for carrier attributes from the ALA Midwinter 2011 discussion paper (<http://www.loc.gov/marc/marbi/2011/2011-dp04.html>) suggest a possible approach for solving this particular problem.

However, here are some cases where combining notes connects information that otherwise could not be connected in the MARC format and that are much clearer for human

comprehension when combined. For example, when DVDs offer multiple language options with varying sound options, the notes are often combined as follows:

546 English (Dolby digital 5.1 surround sound or Dolby surround sound) or  
French (Dolby surround sound) soundtracks.

Sometimes if two related notes are separated, they would appear in quite different places in the order of notes prescribed by the RDA-ISBD mapping. If notes are combined, which element or MARC tag should they be grouped with? Should the decision be based on the predominant information, the first-stated information or something else? Does RDA imply that notes about different elements should not be combined?

Several of the examples that came up for us during the test have to do with language and other types of information. For example, how should the following notes be tagged? Must they be split apart?

546 Essays in English with incidental inclusions in other languages, usually with English translations.

-OR-

500 Essays.

546 In English with incidental inclusions in other languages, usually with English translations.

This note potentially combines information about RDA 7.2 Nature of the Content and RDA 7.12.1.3 Language of the Content.

546 Preface in English and German.

-OR-

500 Preface in English and German.

AACR2 makes a distinction between main and subsidiary or accompanying languages that RDA does not seem to make. The RDA examples that follow are given in RDA 7.12, which maps only to MARC 546. That suggests that such notes should be tagged as language notes.

“In Polish; tables of contents and summaries in Polish, Russian, and English.”

“Commentary in English.”

## Notes on source of title

### 2.20.2.3 Title Source

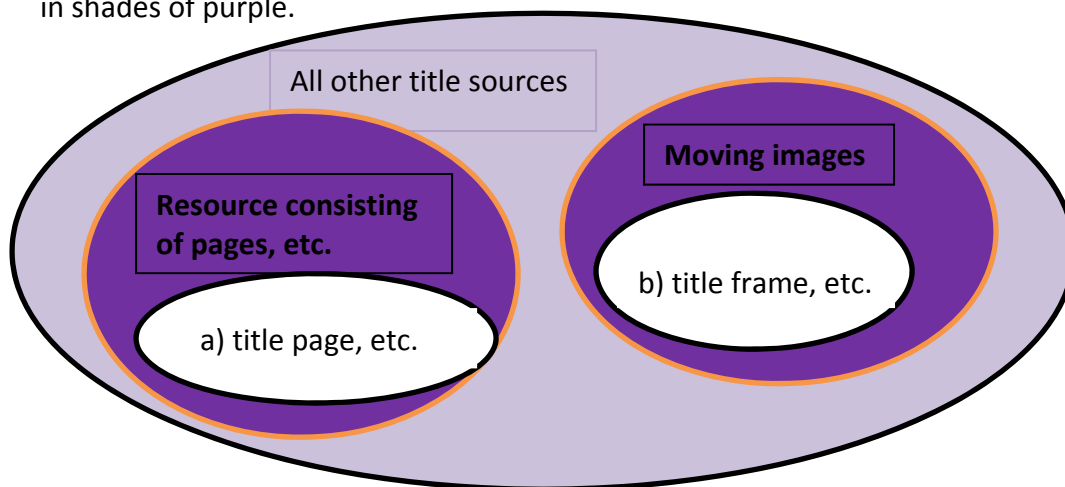
Make a note on the source from which the title proper is taken if it is a source other than:

- a) the title page, title sheet, or title card (or image thereof) of a resource consisting of multiple pages, leaves, sheets, or cards (or images thereof) (see 2.2.2.2)
- b) the title frame or title screen of a resource consisting of moving images (see 2.2.2.3).

Optional omission:

If the resource bears only a single title and the title appears on the resource itself, do not record the source from which the title proper is taken.

What are the implications of this rule for materials that are not moving images and do not consist of multiple pages, sheets or cards as described in category a? The logical implication seems to be that for all materials that fall outside of the categories listed in 2.20.2.3, the cataloger should always make a source of title note. In the following diagram, the two exceptions given are shown in white and the universe of all other possible title sources is shown in shades of purple.



In practice, it seems that many catalogers have continued to do what they have always done. This means not giving title source notes for audio CDs and always giving them for computer discs. There have been solid historical reasons for being clear about the source of title for electronic resources, but for materials with more consistent default title sources, such as sound recordings, source of title notes may seem to add less value.

It is not clear what RDA's intent is with this rule. Nor is it clear how it relates to the seemingly redundant instruction in 2.2.4 to always make a source of title note when the title is taken from outside the resource.

Some of our group members interpreted this rule to only apply to resources that consist of title pages, title frames, etc. to begin with and we suspect that is what RDA meant, but we find it difficult to parse what is actually written in such a way as to extract that meaning. This rule seems to have something in common with those optical illusions such as the one that appears to be a rabbit to a duck depending on how it is viewed.

As a side note, another implication of 2.20.2.3 seems to be that for moving image content in computer file form (as RDA deems video games and computer multimedia content to be), a source of title note should be given whenever the title is not taken from the title frames or title page equivalent.

For an online PDF ebook, if the title were taken from the online title page, it would only be necessary to note the date the cataloger viewed the resource (RDA 2.20.13.5 Date of Viewing of an Online Resource) and not the source of title. This would seem not to apply to HTML versions of ebooks.

## **Cello vs. violoncello in medium of performance statements**

LCPS 6.15.1.6 says that LC will now use "cello" rather than "violoncello" in recording medium statements. Previous LCRI practice was to use "violoncello". Although computers may make this flip less painful than in the past, this still seems like a large change in practice.

## **Information to put in contents notes**

Structured contents notes (505) map to the Structured Description of the Related Work section of RDA 25.1.1.3. This section does not give any guidance or examples for how to give additional information about contents beyond titles and authors.

LC provided the following feedback on this topic.

General comment about contents notes. We see no reason for general or specialized communities to change how they give contents notes. Any constituency that developed a convention for giving needed detail in a contents note is free to continue using that convention. Another general comment: A compilation cannot be named by the first or predominant work in the compilation. So, there should not be any 130 fields for a work or an expression for a record for a compilation. The title proper of the compilation may or may not be a collective title. Per RDA 17.8 or 17.10, the first/principal work or the first/principal expression is a core element; during the Test at LC, we'll be using a 7XX analytical authorized access point to represent that core element.

For moving images, one might wish to add information such as country and date of production, duration, color or b&w, aspect ratio, or version. Duration has generally been added for performed music. After the test, it might be useful to create some guidelines or best practices.

## Duration and sound recordings

(see also the discussion above about information to put in contents notes)

Duration is an element in RDA. It maps to 300\$a, 306, and 500, but not to 505. However, 505 only maps to 25.1 (related works) and not to *any* specific characteristics.

RDA 7.22.1.5 (Duration of individual parts) states, “When preparing a comprehensive description for a resource consisting of more than one component, record the duration of each component.” Component is defined in the glossary as: “a discrete unit of intellectual content within a larger resource.” So it seems that there can be a duration for the part, since each is a discrete unit of intellectual content. However, where to put the duration of parts is an issue. The MARC mapping only maps duration to the 300, 306 and 500, not to the 505.

When duration is recorded in a 500 note, it probably needs to be prefaced with “duration” to make it more comprehensible to users, although this may be less than ideal for future migration out of MARC.

500 Duration: approximately 2 min., 10 sec.

LC’s response to a general question on collections and contents notes suggests that communities should decide what goes in 505 and that the RDA mapping does not prevent us from putting in additional details about contents. A contents note, like the 505 above, is eye-readable, but not very machine-parsible. Although duration does not appear in any of the examples in RDA 25.1 (related works), additional details such as duration do occur in example for structured and unstructured descriptions in RDA 27.1 (related manifestations).

What does RDA mean for the current AACR2 distinction about when to put duration in 300\$a and when to put it in 505?

Related question: how do we know when 505 fields are for related works vs. related manifestations? Or does it not matter? What is the difference between:

Contains: 'Til death do us plots / by Julianne Bernstein — Class act / by Michael Elkin — Where's your stuff? / by Daniel Brenner — Foot peddler / by Vivian Green — Smoke / by Louis Greenstein — Single Jewish female / by Julianne Bernstein — In spite of everything / by Hindi Brooks — Ger (the convert) / by Leslie B. Gold and Louis Greenstein — Golden opportunity / by Julianne Bernstein — Interview with a scapegoat / by Louis Greenstein  
Resource describe (related work in 25.1)

And

Contains: v. 1. Status, distribution, and taxonomy (xvii, 848 pages : 1 map) — v. 2. Field guide (xvii, 740 pages, 96 leaves of plates : illustrations (some coloured), maps (1 coloured)) (related manifestation in 27.1)

Is it the addition of additional details that makes it manifestation-based? Does it matter if those details are related to the work or the manifestation? Duration in a contents note would seem to be related to the expression and chapter 7, where it's discussed, is related to identifying works and expressions.

## **Publisher's numbers**

RDA says to include text such as "Edition Schott" when recording publisher's numbers for music, but the mapping for the field only indicates the use of 028, not 500. How should this be recorded in 028? Should it be at the beginning of 028\$a or in a 500 note? This appears to be an RDA-MARC mapping problem.

028 32 Edition Schott 4162 \$b B. Schott's Söhne

If this is correct, it may be useful to input an additional 028 without the designation for indexing purposes

028 30 4162 \$b B. Schott's Söhne

## **Provider neutral e-monograph records**

Since RDA says to focus the catalog record on the manifestation in hand, it is hard to see how to implement the provider-neutral e-monograph record in RDA. One of the test group members corresponded with someone from the PCC task force that came up with the provider-neutral policy. Our group member was told that RDA does NOT support provider neutral records, since there are supposed to be separate descriptions for each manifestation. The PCC will probably address this sometime in the future, in order to continue the practice of making records provider-neutral, but practice is not supported in RDA at the moment.