

To: RDA Steering Committee

From: Charlotte Christensen, ORDAC representative

Subject: Formal response to RSC/ExtentWG/2024/1/rev2 - Discussion paper on the development of extent elements in RDA

ORDAC would like to thank the Extent Working Group for their efforts in preparing this discussion paper. These are complex issues and the work involved is deeply appreciated.

On the whole, ORDAC likes the direction of the discussion paper's suggestions. Much of the work relating to potential new elements and the uses of those elements seems relevant and provides clarity and flexibility that is needed in this part of RDA. We look forward to seeing proposals come through which flesh out some of the missing details and hope that overall the progression will be smooth because this is a particularly difficult area for libraries to grapple with as they implement ahead of 2027.

ORDAC acknowledges that the rearrangement of this area, including the establishment of new elements and vocabularies, and deprecation or adjustment of existing elements and vocabularies, will place some burden on existing policy writing institutions as well as those working on local policies outside of the Toolkit, but we feel this is simply a necessary consequence of arriving at a more coherent element structure that will provide better outcomes for descriptive communities once this structure is complete.

There are, however, some aspects within the discussion paper that we feel require further work prior to proposals being made, which are discussed at the relevant sections below.

In addition, ORDAC wonders if there is future scope for analysis of some terms commonly used in extent statements which are somewhat opaque outside of the library community. Terms such as *unnumbered pages* and *unpaged* make an assumption that all pages should by default be numbered and suggest that the numbering has been deliberately omitted. This is not part of this discussion paper, but is an outstanding issue for values relating to extent that expresses a library bias to assumptions about how values should be meaningfully recorded.

1. Manifestation: extent of manifestation

ORDAC agrees with the Extent Working Group that Manifestation: extent of manifestation would benefit from being redefined as a superelement.

Recommendation 1.1

ORDAC approves of this recommendation.

2. Manifestation: extent of unitary structure

The listing of the ISBDM Extent of Unitary Structure VES on page 10 was useful for illustrative purposes but was somewhat confusing as relates to the Extent Working Group's recommendation 2.2. Is it the intention of the working group to establish the RDA VES that replicates the terms on this list or simply to establish a VES of as-yet undetermined content? Clearer indication of the intention would have been appreciated, as some readers of the discussion paper misunderstood this to be the suggested RDA vocabulary.

Recommendation 2.1

ORDAC approves of this recommendation.

Recommendation 2.2

ORDAC approves of this recommendation with qualification. We agree there should be a new RDA Extent of Unitary Structure value vocabulary to support the new element from recommendation 2.1 but would like further information on what specifically this VES is intended to contain.

3. Manifestation: extent of unit

On the whole ORDAC likes the concept described here for the new element Manifestation: extent of unit, however we do not understand the reasoning behind separating the measurement of a single dimension from measurements of multiple dimensions. With Manifestation: dimensions being a subtype of the new element it would be valid for values of the subtype element to also be values of the new element regardless of how many dimensions are being covered by that value.

As a separate matter, ORDAC would like to suggest a structure where the element Manifestation: dimensions becomes a superelement for subelements of height, width, depth, etc. as relevant. This granularity would be welcomed by some communities, while others can continue to make use of the element Manifestation: dimensions to record statements combining multiple measurements in the way that they currently do. Along a similar line, this granularity would lend itself to a further expansion in the future to allow for weight, the recording of which is relevant to a range of descriptive communities. It wouldn't fit with dimensions, and possibly is outside the scope of the work of the current working group, but is an example of how this kind of structure could set a precedent for iterative development over time to better serve the wider descriptive community.

We appreciate the deep thinking relating to *leaves*, *sheets* and *pages* covered in this section and at section 13.2.

Recommendation 3.1

ORDAC approves of this recommendation with qualification. We feel the new element should be established as planned but are not convinced that this is the best place for single measurements and want further information from the Extent Working Group on why such measurements are explicitly not relevant as values of Manifestation: dimensions.

Recommendation 3.2

ORDAC approves of this recommendation with qualification. For Manifestation: tape configuration, we understand that the impact other than the hierarchical shift would be a name change. As a structural question, have the Technical Working Group confirmed that this can be done without deprecating the existing element and establishing a new one?

Recommendation 3.3

ORDAC approves of this recommendation.

Recommendation 3.4

ORDAC approves of this recommendation in part. The hierarchical shift is approved. The change in focus to allow for only values of measurements in multiple dimensions is not something we endorse; if there is good reason for this then it has not been sufficiently well explained in the discussion paper.

4. Manifestation: extent of embodied content

ORDAC welcomes the clarity the Extent Working Group have brought to this issue by distinguishing between carried content and other measurements of extent. This is particularly acute in the case of volumes where our interest has traditionally been in the extent of the embodied content, not in the number of pages in total. Past practice had us regularly ignoring preliminary and promotional matter as well as blank pages even though we knew such pages existed in the item in hand, but these remain a valid possibility for counting, and there are certain descriptive communities who would already do so, such as for a rare book collection. Providing an element to focus on the embodied content as opposed to the whole seems a great advance in providing choice to descriptive communities.

However, it is not entirely clear how this element would be used in practice. The examples given on page 16 provide three scenarios, each of a different type of carrier affecting the measurement of the embodied content, but raise several questions about application.

- The first example measures the size of a file, but this is surely a measurement of the size of the whole file, not necessarily just the part that has the text or still image data. Can we say for sure that every byte of that measurement relates to the embodied content, and that all file sizes therefore represent a value of size of embodied content? It seems this is more accurately the size of the whole file and so would be a valid example of a value of Manifestation: extent of manifestation and perhaps also of Manifestation: extent of unit, but not so definitely Manifestation: extent of embodied content.
- The second example provides a value for the pagination of an online resource but does not supply sufficient information to interpret the example. By inference, this cannot always be equivalent to the total number of pages as measured by the display format of the online resource because that could include preliminary matter, etc., that would make it a value of Manifestation: extent of unit. Nor, again by inference, could it be based on the last numbered page because that is covered separately in section 7 under manifestation statements, so it seems this example is either:
 - a situation where all of the 'pages' in the online resource embody content; or

- the total number of actual pages embodying content have been calculated/counted separately from any blank pages, preliminary or promotional matter also contained within the online resource as a whole.

While the first situation can and does happen, it does not represent the reality of many online resources so is not an ideal example without more information about the context. The second situation is possible but unlikely to be useful for many descriptive communities.

- The third example provides a value which works well; this example is clearly a measurement of embodied content which can be clearly distinguished from a measurement of the entire carrier, so fits the definition of this element. However - as illustrated by the fourth example - this is also simply a value of a subtype element, and so can be recorded at either level as best fits the need of a given descriptive community.

In relation to the second example, it is ORDAC's suggestion that instructions and options for this element could be written in such a way as to allow the last numbered page in a sequence to be considered a valid value for this element, and then remove the need to count the actual pages of content. While we acknowledge that this is not the pure intent of the element as defined, it provides a practical solution to the issues discussed more fully at section 7. We would like to see further discussion of this issue as it is currently a barrier to using the superelement Manifestation: extent of manifestation for legacy values such as *56 pages* where that value is based on the last numbered page.

When it comes to the dimensions of the embodied content, the suggestions of moving instructions from the existing elements for still image and cartographic resources are sensible, as is the suggestion of moving similar instructions for dimensions of text blocks.

The value vocabulary discussion seems a little muddled. Before reaching the recommendation it appears that the definitions will be adjusted, while at recommendation 4.8 it becomes clear that this is only one possibility and the other is to establish a new vocabulary with these suggested definitions. There is no discussion here providing information on the implications of adjusting the definitions within the existing vocabulary, nor of what the Extent Working Group see as the benefits and drawbacks of establishing a separate vocabulary which could potentially contain terms also found in the existing vocabulary. Further information from the working group on the two possibilities would be appreciated.

Recommendation 4.1

ORDAC approves of this recommendation with qualification. We feel the new element should be established as planned but would like more information on how the Working Group sees it being used, given that two of the three examples seem problematic. We acknowledge that some of this would naturally come out of options and instructions that are included on the new element page, but in order to make a decision at the high level of whether the element would be useful, it would help to know more about likely usage now.

Recommendation 4.2

ORDAC approves of this recommendation.

Recommendation 4.3

ORDAC approves of this recommendation.

Recommendation 4.4

ORDAC approves of this recommendation.

Recommendation 4.5

ORDAC approves of this recommendation.

Recommendation 4.6

ORDAC approves of this recommendation.

Recommendation 4.7

ORDAC approves of this recommendation.

Recommendation 4.8

ORDAC approves of this recommendation in that there should be a value vocabulary linked with this element. We find the layout of a recommendation containing alternatives to be awkward. Either possibility is viable, but by preference ORDAC can see value in having a specific RDA Layout of Embodied Content value vocabulary established.

Recommendation 4.9

ORDAC approves of this recommendation, though this recommendation seems to imply that the decision at 4.8 will be to expand the existing RDA Layout value vocabulary and so is redundant if the decision at 4.8 is to establish an RDA Layout of Embodied Content value vocabulary. While it would be theoretically possible to establish the new vocabulary without explicitly adding these terms, it would then contain nothing at all.

5. Manifestation: extent of aggregated content

Overall this element seems functionally valuable, however it was not entirely clear from the discussion paper why the Working Group is recommending that this new element be established alongside the new element Manifestation: extent of embodied content. The discussion seems to assume that this is an obvious conclusion and yet all aggregated content is embodied so further clarity on the reasoning for this split is needed.

The section begins with the assertion that there are certain existing values of the vocabulary RDA Carrier Extent Unit which are better described "*as values for certain kinds of expression*" but, other than a couple of examples, does not clearly define what those kinds of expression are. The discussion that follows focuses around content type, which provides an implied distinction from the already discussed element Manifestation: extent of embodied content which focused more on carrier. Several other assertions are made, including the fact that Manifestation: note on manifestation could be used to record some information, which is true of most manifestation values where a descriptive community chooses not to use (or is unable to use) a more specific element; and that "*If a manifestation embodies only a single expression, then a Content Type value is recorded with an implicit '1' for quantity*" which again would depend on whether a given descriptive community chose to explicitly record the value '1' or not.

The suggestion of a new value vocabulary seems warranted, but following this with values "derived from the value vocabulary" ISBDM Extent of aggregated content was confusing. On comparison between the vocabulary lists it became clear that the definitions here are simply the ISBDM definitions with the words "*a unit of extent of aggregated content that is*" removed. This leads to several definitions simply being absent altogether, such as for *part*, *profile*, *score*, *vocal score*. The information here does not seem to be a fully prepared RDA VES suggested by the Working Group, but instead an example of how another standard has handled this situation. It is then not clear what the working group intends to include at recommendation 5.2 if a new value vocabulary is established. The recommendation seems to involve movement of terms from two other existing RDA value vocabularies so why was it useful to include the full ISBDM vocabulary at this point, and to partially amend the definitions?

From here the discussion turns to the similarity of terms to the existing value vocabulary for RDA Illustrative Content.

The last paragraph on page 21 indicates that the Extent Working Group interpret all "*images used in graphic novels and picture books*" as amalgamations rather than ever being valid as supplementary content and therefore outside the scope of the element Manifestation: illustrative content. This statement is unhelpful in that it suggests that all images used in these situations would be considered amalgamations and never as supplementary content, yet that does not seem to be true. LRM does not define amalgamation, but in RDA it is defined as *An expression that includes contributions that cannot be separated into other expressions*. Picture book text can be published with different illustrations than were included in the original manifestation. To treat this text as an amalgamation is to say that the text expresses an entirely different work than the text embodied in the original manifestation. The point being made in this paragraph remains valid, that the element Manifestation: illustrative content is too narrowly defined to properly describe amalgamated content where it occurs, but the emphasis on picture books and graphic novels is unhelpful in suggesting that neither of these types of resource can involve supplementary content.

Back to the main point about Manifestation: illustrative content, this discussion leads to the possibility of soft-deprecating this element entirely and the impact of that choice. It is not clearly stated but it seems that the Working Group feels this should not happen, and thus is recommending that there simply be similarity in the value vocabularies for each element (Manifestation: illustrative content and Manifestation: extent of aggregated content) and that they can be used independently or together as required by descriptive communities, with the understanding that the values have different meanings for what appear to be the same words (e.g. map).

Recommendation 5.1

ORDAC approves of this recommendation.

Recommendation 5.2

ORDAC approves of this recommendation in that there should be a value vocabulary linked with this element. We find the layout of a recommendation containing alternatives to be awkward. Either possibility is viable, but by preference ORDAC can see value in having a specific RDA Extent of Aggregated Content value vocabulary established.

6. Containers

ORDAC thanks the Extent Working Group for their discussion of the issues around recording values of extent involving containers. This raises useful distinctions for existing users of RDA as well as potentially making the standard more useful to other descriptive communities. The descriptive communities working in archives, museums and galleries, for example, may appreciate this clarity around containers versus what has been contained.

In particular, the example of an album as a container of individual photographs compared to a sketchbook where the drawings cannot be separated from the volume was greatly appreciated.

In the section related to containers supplied for an item, there was an unusual emphasis on the manifestation and item note elements, and a pointer to the DCRMR instruction dealing with extent of containers that are not issued with a resource. While it is true that some descriptive communities will indeed want to make use of DCRMR, the decision whether or not to make use of note fields as part of a description rests with a given community and the emphasis here of what "should" be done was unnecessary. The use of these elements is valid, but it seems there is some cross-over here between what some descriptive communities will find useful, and the purpose of this discussion paper in helping us to determine what changes need to be made to RDA to improve the ability of communities to clearly record the values that are useful to them. This emphasis repeats in the section *New value vocabulary: RDA Container Terms* where an assertion is made that "*The terms would also be used for containers supplied to house individual items, which is information recorded in the element Item: note on item*".

Recommendation 6.1

ORDAC approves of this recommendation.

Recommendation 6.2

ORDAC approves of this recommendation.

Recommendation 6.3

ORDAC approves of this recommendation.

Recommendation 6.4

ORDAC approves of this recommendation.

7. Manifestation statements for extent

Manifestation: manifestation extent statement

ORDAC is in favour of the creation of a manifestation statement element that allows descriptive staff to transcribe the information present on a manifestation that identifies some kind of value of extent. This seems a very sensible addition to the set of manifestation statement elements, all of which perform an important function in assisting our descriptions to reflect how a manifestation represents itself, regardless of whether the information is accurate.

It is also very useful to note that the transcribed value may include information relating to one or more expressions rather than solely to the manifestation alone, and that this is still valid.

Manifestation: manifestation numbering of extent statement

Initially ORDAC was in favour of this new element. The concept that the last numbered page of a sequence is in fact simply how a manifestation represents itself is an appealing new way of understanding this information - we do not count to confirm that the number is correct, we merely record what is there.

However we then developed several concerns as we read on.

Concern 1: wrappers and "transcription guidelines"

Manifestation statement elements record what is present on the resource itself. Occasionally we might see pagination presented as "page 54" or "page 54 of 54" but more frequently it is simply a number: "54" to which we add a term to identify what the 54 represents. Since the term is not present on the resource, it is not valid for inclusion in a value of a manifestation statement element.

Additionally, it is possible that the number on a given page is only interpreted by descriptive staff to be valid as a measure of length, and that in fact its purpose is more relevant to knowing where particular content is situated, e.g. "*I read this on page 27*" rather than "*this page is numbered 27 so I know it's meant to mean that's how many pages there are in the volume*". There is still value in making use of this information for descriptive purposes - it provides us with a quick method of measurement and allows other descriptive staff to confidently compare the item they are describing with the one already described by another institution - but it does not mean that the publisher or reader would agree with us that the last numbered page gives us the total number of pages in a book. Nor do we usually confirm by counting that the number is accurate; in fact we often know that it isn't by looking at the first numbered page which frequently isn't "1".

In the case of elements other than manifestation statements we can build a value by taking some information and adding to it, usually using a value vocabulary (VES) to supply some of the additions. The VES in this case would contain the terms outlined on page 27 ("page", "leaf", "plate") and options or instructions would then permit us to convert this to a plural form as required. Since this would then be a structured description, it again is not a valid approach for a manifestation statement element.

More concerningly, the Extent Working Group speaks of "additions to the transcribed values, such as separators like a comma, or a dash between the first and last number in a sequence" as being the kind of instruction found in a transcription guideline. This is simply not so: these are string encoding scheme instructions. While the transcription guidelines allow for addition or omission of punctuation for clarity, they do not specify what that punctuation should be nor when you should add or omit other than if it seems 'unclear'. By contrast, this is a situation where a descriptive community would regularly want to use a comma or dash to separate two values to know when to use which. Moreover, exactly which punctuation was used, and when, is of concern to a given descriptive community, which is true of all string encoding schemes. This is not at all relevant to a transcription guideline to be contained with RDA; it should be handled through a string encoding scheme exactly as is done with other situations such as values of Manifestation: publication statement or Person: authorized access point for person.

Concern 2: the disconnect between manifestation statements and Manifestation: extent of manifestation

At the beginning of the discussion paper, the Extent Working Group expressed the importance of being able to handle legacy statements of extent as values of Manifestation: extent of manifestation through the creation of relevant subelements that could be aggregated up into a superelement value. Yet manifestation statement elements are outside of this hierarchy and therefore values of the manifestation statement elements cannot be considered valid as values of Manifestation: extent of manifestation.

The three main new elements related to volumes (and thus pagination) are Manifestation: extent of unit, Manifestation: extent of embodied content and Manifestation: extent of aggregated content. The fact that these values differ from the last numbered page-derived value is clearly illustrated on page 29 in the section *Comparing elements*. None of these currently adequately cover the legacy practice of making use of the last numbered page in a sequence, and therefore there is nothing available in the subelements to give us the equivalent value at Manifestation: extent of manifestation.

Resolving the concerns

ORDAC recommends the following approach to resolve this issue, dependent on further consideration from the Extent Working Group and other respondents to this discussion paper:

- 1) do not establish the element Manifestation: manifestation numbering of extent statement;
- 2) include the ability to record a transcribed value of last numbered page as part of the instructions/options for the element Manifestation: extent of embodied content;
- 3) include relevant terms in the new value vocabulary RDA Extent of Embodied Content where they are not already covered, and ensure the definition covers this usage.

Alternatively, and more controversially, it could be possible to place the element Manifestation: manifestation numbering of extent statement hierarchically under Manifestation: extent of manifestation. This only partially resolves the problem and may in fact break the structure of RDA; the advice of the Technical Working Group would need to be sought to confirm that this is even possible. Regardless, this would still only allow us to record what is present as values of the manifestation statement element, and the VES and SES would need to be applied at some other element to ensure the value was complete. This is a more complicated solution, and is not preferred by ORDAC.

It is possible there is a different solution than those suggested here and ORDAC welcomes discussion as to how to resolve these, but it is important the discussion follows RDA definitions and structures when talking about 'transcription' and 'manifestation statements'.

Recommendation 7.1

ORDAC approves of this recommendation.

Recommendation 7.2

ORDAC does not approve of this recommendation. The new element as described is not functional and requires significant additional work or an entirely different solution to become viable.

Recommendation 7.3

ORDAC does not approve of this recommendation. The recommended changes are not a valid use of a transcription guideline.

8. Manifestation: note on manifestation

ORDAC would point out that the element is very broad and functional for uses related to all other Manifestation elements so examples and instructions relating specifically to a single type of usage may not be appropriate. It seems more likely that the instructions and/or options that point to this element from relevant extent elements would contain those examples.

Recommendation 8.1

ORDAC approves of this recommendation in principle but expects a proposal to precede any changes as at this stage there seems little reason to need to make these changes.

9. Expression: extent of expression

ORDAC would ask the RSC to consider whether the charge for the Extent Working Group could or should be expanded to explicitly include revision of this element. The majority of the work is rightly focused on the manifestation level where there are known and significant issues impacting on descriptive communities, but this element currently appears only to exist in order to provide a hierarchical superior for Expression: duration.

Recommendation 9.1

ORDAC approves of this recommendation.

10. Work: extent of representative expression

Recommendation 10.1

ORDAC approves of this recommendation.

11. Expression: duration

Recommendation 11.1

ORDAC approves of this recommendation.

12. Work: duration of representative expression

Recommendation 12.1

ORDAC approves of this recommendation.

13.1 Other issues: Atlas

Recommendation 13.1

ORDAC approves of this recommendation.

13.2 Other issues: Vocabulary terms related to sheets and leaves

ORDAC appreciates the work done by the Extent Working Group on exploring and resolving issues related to sheets and leaves in relation to current usage. The explanations and reasoning for change were very welcome and the new definitions seem appropriate. It is also good to see previously undefined terms now covered.

Recommendation 13.2.1

ORDAC approves of this recommendation.

Recommendation 13.2.2

ORDAC approves of this recommendation.

Recommendation 13.2.3

ORDAC approves of this recommendation.

Recommendation 13.2.4

ORDAC approves of this recommendation.

Recommendation 13.2.5

ORDAC approves of this recommendation.

Recommendation 13.2.6

ORDAC approves of this recommendation.

Recommendation 13.2.7

ORDAC approves of this recommendation.

Recommendation 13.2.8

ORDAC approves of this recommendation.

Recommendation 13.2.9

ORDAC approves of this recommendation.

Recommendation 13.2.10

ORDAC approves of this recommendation.

Recommendation 13.2.11

ORDAC approves of this recommendation.

13.3 Other issues: Photographic print vs photograph

A shift to different terms for the different uses of 'photograph' is a welcome clarification.

Recommendation 13.3

ORDAC approves of this recommendation.

14. Reorganization of current RDA value vocabularies

Recommendation 14.1

ORDAC approves of this recommendation.

Recommendation 14.2

ORDAC approves of this recommendation.