

RULES FOR RESOURCE DESCRIPTION AND ACCESS IN LIBRARIES, ARCHIVES AND MUSEUMS PRINCIPLES AND STRUCTURE¹

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KEYWORDS:

*cataloguing principles, cataloguing
rules, cultural heritage
communities, identification, context*

ABSTRACT

New rules for resource description and access in heritage institutions represent a data content standard adjusted to contemporary forms of the catalogue as well as data sharing possibilities. The article explains the main principles and structure of the rules in the context of heritage communities' conceptual models and international standards. It defines the notion of unit of description and presents criteria for organising data elements. The article is particularly focused on demands for the unique identification of a resource and other related entities regardless of the collection or institution in which they are described, while preserving the specific institutional context.

1 With the permission of the publisher, the Croatian Museum Association, this paper, translated into English, is taken from *Arhivi, knjižnice, muzeji: mogućnosti suradnje u okruženju globalne informacijske infrastrukture* 20 (2017), 110-129.

Introduction

The rules for description and access to resources in heritage institutions are largely subject to the available technology for searching and displaying information. The *Pravilnik i priručnik za izradbu abecednih kataloga (Rules and Manual for Alphabetic Catalogues)* by Eva Verona (1970/1986-1983), which was in use in Croatia and the other countries of former Yugoslavia from the early 1970s on, is evidence of the theoretical and practical achievements of modern bibliographic information organisation in the pre-internet period. At the beginning of the new millennium, when the library community made efforts through revision to adapt its basic documents to the rapidly changing technological and information environment and develop a new model of bibliographic organisation, work began on updating Verona's rules, followed by the production of a new national standard for cataloguing.²

As is well known, the new rules are not intended only for libraries or description of publishing products, but also for archives and museums, which were actively involved in their development. New means of searching, exchanging and linking data in the digital environment have contributed to heritage communities coming closer together as they have come to recognise their joint goals and began the work on aligning their resource description standards in order to make their data increasingly accessible at as little cost as possible, via cooperative catalogues, portals, web services and other network services. From this, two basic demands have emerged, which the new cataloguing rules must satisfy. The first is the demand for catalogues to be adapted to new technology, particularly linked open data, while attempting not to overlook the potential for functioning in other technological environments.³ The second is establishing a common group of rules to be used by archival, library and museum communities. This group of rules, as we shall see,

- 2 In 2010, within the work of the Cataloguing Commission, the Croatian Library Association began work on updating the existing cataloguing rules and aligning them with new editions of the specialised ISBD and consolidated ISBD edition (2014). Preparation for the start of work on the new rules was laid out in the Plan of Work of the National and University Library in Zagreb for 2011 (December 2010). The project *Creation, Publication and Maintenance of National Cataloguing Rules* began in 2013, with the signing of the *Agreement on Cooperation to Produce National Cataloguing Rules*. The signatories, as equal strategic partners, were the National and University Library in Zagreb (the main holder of the project), the Croatian Library Association, the Department of Information and Communication Sciences at the Faculty of Humanities and Social Sciences, University of Zagreb, the Department of Information Sciences of the University of Zadar, the Department of Information Sciences at the Faculty of Philosophy, Josip Juraj Strossmayer University, Osijek, the Croatian State Archives, and the Museum Documentation Centre. The Museum of Arts and Crafts and the Croatian Natural History Museum joined them in 2014 by signing an annex to the Agreement.
- 3 For more on the idea, opportunities and practical issues of the semantic web and integrating catalogues with other data sources on the web through open linked data, see Willer and Dunsire (2013), and Hooland and Verborgh (2014).

implies that the resource described is uniquely identified, regardless of who created the description, when or where, while preserving the specific context in which the resource is viewed by a particular community or institution and its users.

Unique identification regardless of place or context where the resource is stored

In considering theoretical concepts which are common to archival studies, museology and librarianship, Tatjana Aparac noted twenty years ago that the availability of documents and information regardless of where and how they are stored would be the main principle leading to the convergence of these disciplines within the information sciences (Aparac, 1998, 24). A similar idea had already been around for a long time in the theory of information organisation – let us recall the vision of a universal knowledge base propounded by Paul Otlet and Henri La Fontaine at the beginning of the 20th century (Rayward, 2013), but with the arrival of digital and digitalised material, it became a reality. One reason for this, as Lagoze (2000) points out, is that ‘digital documents’, ‘digital museum objects’ and ‘digital archive materials’ impose remarkably similar demands in terms of description, access, authentication and preservation. Thus, their similarities in terms of documentation goals and procedures come to the foreground. In this environment, the new function of the catalogue is to act as a ‘mediation tool’ to bring together data from different heritage communities, and to describe entities (objects, peoples, organisations, places, events, etc.) which they have in common.

One of the key requirements of such catalogues is the unique identification of resources and other linked entities, regardless of the place and context in which they are stored. For example, archives, libraries and museums often collect, process and store the same kind of resources (drawings, photographs, maps, videotapes, etc.), which sometimes includes items from the same series or edition (for example, graphics, posters or books). It has been demonstrated, however, that the context of the institution where the resources are housed, including its long-accepted work processes and standards, as well as the basic education of experts who describe the resources (for example, whether they are art historians or archivists), results in significant deviations in understanding and describing the same resource (Štefanac, 2013). This can lead to problems if descriptions differ to such an extent that they make identifying and finding the subjects difficult.

Therefore, the tasks of the rules are:

- 1) To establish a group of common entities which are the subject of interest to all heritage communities;
- 2) To establish rules for description which will be founded on international standards, and concentrate as much as possible on the type of resource, rather than the institution where it is housed.

In other words, “Rather than conceiving of the suite of standards consisting of CDWA, CCO, CDWA Lite and OAI as the ‘museum way’ of describing objects, this combination of standards emerges as the appropriate form of description for cultural resources, regardless whether they happen to be housed in a library, archive or museum. This argument makes eminent sense: nobody would question the rule of thumb that a book should be described with the suite of standards housed in the ‘Bibliographic’ column (...), even if it is managed by an archive or a museum” (Elings and Waibel, 2007).⁴

Establishing a common group of rules is achievable despite the extraordinary complexity of the task, particularly if we take into account the fact that, while developing their own standards, the heritage communities have already invested significant efforts to homogenise descriptions of the same and similar types of resources in various institutions (Elings and Waibel, 2007).

Units of description

Conceptual data models are of great help in identifying entities which are objects of interest to all heritage communities. A conceptual model is a simplified depiction of a particular field of knowledge. Its role is to define the main concepts in the field, their properties and mutual relations, thus creating the basis for ‘understanding’ between knowledge domains. By analysing conceptual models of library, museum and archival communities – *IFLA Library Reference Model* (IFLA LRM) (Riva, LeBoeuf and Žumer, 2017), *CIDOC Conceptual Reference Model* (ICOM, September 2017) and *Records in Contexts* (RiC) (ICA, September 2016) - five basic entities have been confirmed, which are identified and described in catalogues and other discovery systems in heritage institutions. These common entities are known as *units of description* in the rules, since they represent the focus of data in the catalogue.

Resources are defined as tangible and intangible objects which occur as a re-

4 The abbreviations refer to *Categories for Description of Works of Art, Cataloguing Cultural Objects* and *Open Archives Initiative*.

sult of human or natural activities, and which have social, historical, scientific, cultural and/or artistic significance, thus being objects for collection, storage, processing, communicating and preservation in archives, libraries and museums. The *agent* is a person or group of people who can be considered responsible for the action or effect of the action on the resource, which comprises not only the classic concept of authorship, but also other activities, such as collecting, producing, repurposing, performing, determining, owing, etc. Sub-types of agents are persons, families, and corporate bodies. The *place* is a political-territorial (socio-geographic) or natural (physical-geographic) part of the Earth or beyond it. The *time span* is a period with a defined beginning, duration and end. The *concept* in the widest sense covers any ideas, notions, objects or events.

If we observe these units of description and their definitions, it is obvious that the rules introduce another change. They do not cover only formal description, but also subject access to resources. It is sufficient to note, for example, the extended definition of place, which is no longer just a political-territorial area, which would suit the requirements of descriptive cataloguing (place of publication, seat of corporate body, place of birth or death of a person, etc.), but also includes natural areas such as mountains, rivers, seas or planets. This serves primarily to describe contents. It should also be noted that the rules do not deal with creating subject authority files, classifications and other controlled vocabularies, but are confined to provisions relating to their application, for example explaining the principles of content analysis and defining descriptive elements related to the subject of the resource, such as subject headings, summaries, or genres.

There are several reasons for including the basic principles of subject cataloguing in the rules. First, while in libraries formal and subject cataloguing are traditionally separated work processes, in the standards of other heritage communities, they are much more integrated. Archives, and particularly museums, would rightly regard description omitting topics or iconography as incomplete. Secondly, the IFLA LRM library model also integrates formal descriptive and subject approaches to the bibliographic universe. This of course does not imply the obligatory creation of integrated standards, but clearly indicates the trend towards a holistic approach in modern bibliographic organisation.

Elements of description

A unit of description is described in the catalogue using the appropriate data categories which are called description elements or data elements. For a resource,

these are for example the title, dimensions, material, colour, etc. For a person, they are the dates of birth and death, and occupation or area of work. For a place, they are geospatial data, and so on.

In Verona's rules, as in the *International Standard Bibliographic Description* (ISBD, 2011), the description elements for a resource are organised in larger units called areas. However, in the new cataloguing code the structure according to the ISBD areas was rejected for a number of reasons. First, rules which reach outside the library community must include elements of description beyond bibliographic standards. Besides ISBD, the sources for the new rules are *Categories for the Description of Works of Art* (J. Paul Getty Trust, 2016), *Cataloguing Cultural Objects* (VRA, 2006), *Spectrum* (Collection Trust, 2011), *General International Standard Archival Description* (ISAD(G)) (ICA, 2000), *International Standard Archival Authority Record for Corporate Bodies, Persons and Families* (ISAAR(CPF)) (ICA, 2004) and *International Standard for Describing Institutions with Archival Holdings* (ISDIAH)(ICA, 2008). By using the vocabulary of information systems, the rules could be said to represent a sort of application profile composed of the above standards. Bibliographic description is supplemented by elements used in archival description and description of cultural and natural objects in museums, which primarily refer to the life cycle of the resource (for example, data on a finding site or former owners), including the circumstances in which it came to the institution and the conditions under which it can be accessed by users. This segment of work on the rules demanded significant efforts to analyse, compare and map the meaning of elements from different standards.

Another reason for abandoning the ISBD areas as the main criteria for organising the rules was the previously mentioned focus on individual data rather than groups of data such as description areas or records. The basic unit of the catalogue is no longer the record. Instead, data on resources and other entities can be organised in various types of records, including those which are not stored in databases, but generated and displayed to users in real time. In library catalogues, for example, it is customary to organise data in bibliographic and authorised records, the former clustering descriptive data on a resource, and the latter serving to control various forms of names and titles for the resource (uniform title) and other related entities (name of person, name of corporate body, geographic name, etc.). It is possible, however, to envisage that data about a resource, instead of being organised into a bibliographic record, are organised relationally into several independent records, each one representing an aspect of the resource according to the IFLA LRM model, as will be explained later in more detail. It is also possible to envisage that the

description of a person in a catalogue consists of several separate, mutually linked records which represent various identities under which the person appears in public life (for example, Tomislav Gotovac and Antonio Lauer). Finally, it is possible to envisage a less sophisticated technological environment where all data about a resource, the person responsible for its creation, various identities or forms of that person's name, and so on, would be gathered in a single record.

In the rules, how data are organised is mostly left up to the individual communities or institutions, in accordance with their specific needs and technological capabilities, or simply with their traditions. So, it is still recommended, when displaying biographical data, to use the ISBD syntax and punctuation, though these are not obligatory for all. In any case, many online library catalogues have not been following the ISBD syntax on their user interfaces for some time. Instead, they provide an option to display records “according to the ISBD” along with other types of display (for example, in the form of bibliographic citations).

What are the criteria used in the organisation of the rules then? The elements are still organised into chapters which correspond to certain areas of description (for example *Identification of resources*, *Physical description of resources*, *History of resources*, *Identification of agents*, *Description of agents*, etc.), since this is a principle followed by all international standards on which the rules are based. In *Spectrum*, for example, such chapters are called ‘information groups’ and defined as “groups of related information units” which describe particular aspects of a resource and other entities related to it (Collections Trust, 2011). ISAD(G), nevertheless, calls these groups ‘areas’ (for example, Identity statement area, Content and structure area) (ICA, 2000). However, the chapters in the rules do not follow the ISBD, *Spectrum* or ISAD(G) areas or those of other standards slavishly, but are organised analogously.

The elements in the chapters are organised in an order which more or less follows normal practice for description. For example, the identification of a resource generally begins by determining the term for the type of resource (for example, a vase) or the level of description (for example, a fond, a sub-fond, a series, etc.). Next, the title is given, if available, or if not, one is created. In the physical description of the resource, general data such as extent or dimensions are generally noted first, then specifics such as file format, digital image resolution or speed of sound reproduction. However, the order of elements in the chapters does not affect in any way the order of procedures in compiling the description or displaying data in a particular IT system, since this is a matter of choice by the individual institution or community. It should not need to be stressed that a different logic could have been

applied to arranging elements in chapters. For example, means of recording – digital or analogue – could be considered a physical description, but also information on how the resource was produced. A variety of perspectives is typical of any classification procedure. The existing organisation, we hope, should satisfy most logical and pragmatic demands.

It is important, however, to emphasise that, thanks to the availability of the rules on line, elements of description and pertinent provisions can be organised according to various criteria. Although the approach described above has been selected as the primary one and is offered to cataloguers in the form of the main menu, the elements can be filtered and displayed according to the entities of the IFLA LRM model, according to properties such as optionality or repeatability, and according to the types of resource to which they relate. It is possible, for example, to single out the elements and provisions which relate to manifestation, music, digital media, continuing resources, etc.

Contextuality

Context of data within description

A focus on data as independent information units which can be combined in records as necessary makes them easier to search, retrieve, link and integrate in various systems, in line with the postulates of the semantic web. The perspective which sees each piece of data as an independent access point is more usual in archives and museums than in libraries, where cataloguing is closely linked to transcription and mutual dependence of data within a syntactical expression such as an ISBD area. Therefore, it is not surprising that ‘breaking down’ these expressions into independent data has been criticised in the library community. In his criticism of RDA, for example, Alberto Petrucciani considers this approach to be more an exercise in formalising a conceptual model than a truly professional tool for organising and presenting cultural phenomena.

“...When a list of elements, or even an “ontology” is formed from concepts which are determined by context, such as the area 4 of ISBD, there is a danger that the *difference between words and things* will be lost altogether, that is, the “place of publication” in the sense of the transcription of a linguistic expression in the source data and the

“place of publication” in the sense of a locality which actually exists and can be identified on Earth. (...) The total information which forms a bibliographic description is *not a “group of data”*, but, at least in its most important elements, a “discursive” structure, in short, a *text*, though extremely structured. And in each text, meanings are mutually dependent and related to context.” (Petrucciani 2016, 113).

The context of data of which Petrucciani speaks can, however, be preserved in several ways, even when each piece of data is considered separately. First, although data can be stored separately, it is possible to link them in a display in meaningful series according to a previously established syntax. The aim of the syntax is not merely the presentation - Petrucciani is right when he cautions that the ISBD is not simply a “standard for display” (Petrucciani, 2016, 123), but the actual contextualisation of data. But other communities may wish to contextualise data in a different way than libraries.

Moreover, in the rules and cataloguing practice, as Petrucciani cautions, it is necessary to differentiate clearly between data which are taken literally from the resource (such as the phrase *Vu Varasdinu*, which denotes the place of publication in a book) and data recorded from other sources, which have the function of controlled access points (such as the controlled access point *Varaždin*, which appears as a link in the description). The first example is the result of the principle of representation, or the requirement that the resource is described in the catalogue primarily as it appears. This improves the accuracy of the description and makes identification easier. The second example arises from the requirement to create a syndetic structure to allow navigation, searching and retrieving new information. The difference between transcribing and recording information, which is emphasised in RDA, is expressed in the Croatian rules even more explicitly, so that most data which are transcribed (title proper, statement of responsibility, numerical and chronological data on serials, place of publication, year of publication, etc.) are placed in a separate chapter called *Representation of resource*.⁵ These data play a key role in the identification of certain manifestations, i.e. editions, but are not used only for identification, as they cover various aspects of the resource, from its inception to its relationship with other entities. Perhaps it would be most appropriate to say that they serve as a warranty for the accuracy of data which appear

5 *Representation* means the data found on or in the resource in terms of self-identification and self-description. The expression was coined from the ‘principle of representation’, which is one of the basic cataloguing principles of the library community. See *Statement of International Cataloguing Principles (ICP)* (December 2016). It matches the *Manifestation Statement* in the IFLA LRM model.

in the description in the form of controlled access points, and which link the description to other data within and outside the catalogue, playing the intermediary role, which Lagoze considers to be the main task of catalogues today. In archives, and particularly in museums, these data are often the result of researching other sources (scholarly and reference literature, comparative sources, etc.) which are also recorded in the description, while libraries primarily rely on the resource itself as a guarantee of data accuracy.

In contrast to the ISBD provisions which often present these elements as a combination of transcribed and recorded data, the provisions of the new rules require that, apart from in exceptional cases, the principles of transcription are strictly followed, which means that, for example, typographical errors will not be corrected, and square brackets will not be used to add data taken from outside the resource. The necessary corrections and additions from other sources will be included in notes or elements which serve as authorised access points. For example, the corrected version of a title can be shown as the uniform title. Data on responsibility which are found outside the resource will be recorded as the relationship between the work and a person, family, or corporate body. Thus, the prerequisites are created for making a clear distinction *between words and things*, or, to put it more accurately, between *words* which denote the same things, but with different goals.

Finally, context can also be preserved owing to the fact that in the rules the elements of description have different degrees of granulation. The ‘focus on data’ already mentioned does not exclude, for example, a whole ISBD area being observed as one element (*Publication, production, distribution, etc. area*), which in turn comprises sub-elements (*Name of publisher, Place of publication, Parallel place of publication, etc.*). The level of granulation in the description depends on specific conditions, such as the type of institution, type of resource, size of the collection, or dynamics of inflow of resources. In any case, the element *Publication, production, distribution etc.* allows for transcribed data to be shown at a ‘rough’ level of granulation, if it is not desirable or possible (for example, with linguistically linked expressions) to ‘break it down’ entirely.

The context of the resource within the institution

When we speak of context, however, we cannot limit ourselves simply to the importance of data within certain syntax. The provisions of the rules, as we have seen, focus on the unique identification of resources, regardless of where they are stored or described. Yet we should not overlook the specific context in which

each institution collects, keeps, processes and communicates, or allows its resources to be used. Some of the mechanisms for preserving context are described in the following paragraphs.

The resource: aspect and scope

The resource is one of the basic notions in any cataloguing rules, but is also a notion in bibliographic theory which has caused controversy for decades. It is enough to recall the discussions about whether the primary purpose of the catalogue is to describe a ‘literary unit’ (the abstract work) or a ‘bibliographic unit’ (the item in one’s hands). IFLA LRM resolves the problem by introducing four mutually exclusive entities – work, expression, manifestation, and item, all of which can be described separately and then linked.⁶ Nonetheless, widening the subject of description to all types of cultural and natural objects has again complicated the situation. However much they may be a welcome solution in the bibliographic domain, the IFLA LRM entities cannot be easily applied to resources in which the contents cannot be separated from the media. Most museums, for example, collect and exhibit resources because they are unique in terms of content and form. According to Ivo Maroević, all objects of cultural heritage are determined by three main properties: material, form, and significance. These are not always equally represented in the valorisation and interpretation of the object. Maroević explains that with most library resources, the most important property is significance (content), which can be isolated from form and material (a book can be microfilmed, analogue images can be digitalised, etc.), while with archival resources, both significance and material are important, and with museum resources, the combination of all three is vital (Maroević, 1998, 5-6).

Exactly for this reason, and in contrast to the RDA approach, the Croatian rules do not literally adopt the IFLA LRM structure and terminology. Instead, *work*, *expression*, *manifestation* and *item* are considered aspects of a *resource* which may be separate units of description, on condition that their belonging to the same resource is clearly emphasised by establishing mutual relations.⁷ This approach is recommended for resources which exist in several versions, editions, or adaptations (for example, in different media and languages). It is particularly useful to librarians who handle large amounts of fiction in different media, but

6 For the definition of entities, see Riva, LeBoeuf and Žumer (2017, 13-18).

7 The perspective which sees *work*, *expression*, *manifestation* and *item* as aspects of a resource is explained in Dunsire (October 2013).

is also of service to all institutions who transfer resources into other media (for example, microfilm or digital forms) in order to preserve them, make them more widely available, or for other reasons.

Apart from the *aspects* of a resource, individual institutions or cataloguers – in line with the user needs, the nature of the resources, the type and size of the collection, and other factors – decide the *extent* in which to identify and describe a resource which consists of several parts or pieces. For example, they decide whether a collection will be described only at the collection level, or also at the level of individual pieces; whether a multipart resource will be described as a whole, or each part will be described separately, etc. So, in the rules, resources have four subtypes: collective resources, sets of resources, individual resources, and components. *Collective resources* are archival fonds, collections, and their subunits. *Sets of resources* are record groups (CDWA), multipart and serial resources, and aggregations of existing works, such as anthologies and albums. Individual resources are the smallest logically or physically independent units (for example, magazine articles, compositions for a music album, or a teapot in a tea service), while *components* are their logically or physically dependent parts. The latter are usually not described independently, although they may be, if describing them is considered useful because of their uniqueness or significance. This division corresponds to a great extent with the entities of the RiC archival conceptual model – *Record sets*, *Records* and *Record components* – and enables issues regarding the description of each individual subtype to be approached systematically and consistently.

Expressing context using description elements

In order to satisfy the requirement of unique identification, the rules prescribe a small number of elements of description which are mandatory in all situations (identifier, title, extent, etc.) on condition that they are available in the prescribed data sources. So, the title proper will always be mandatory if available, which means that it must be rendered in the description of the book, regardless of the institution where the item is found, and whether it is considered an ‘ordinary’ library lending resource, or an object of special historical or artistic importance. The way in which the title proper is rendered must also be uniform (for example, without correcting typographical errors), regardless of whether it is registered by a librarian in a library or a curator in a museum. Other elements shall be mandatory if applicable: for all collective resources described, essential information includes the conditions under which they are available to users, while the scale is

mandatory for models and geographic maps, the musical format for music, the reduction ratio for micro-forms, etc.

Establishing the applicability of elements of description is closely linked to the process of establishing the type of resource, which belongs to the primary procedure of identification and is carried out by determining, as necessary, the common term (tea service, board game, flag, sabre, pottery fragment, etc.), or, if the resource can be divided into the content and medium, the content form (text, painting, music, etc.) and media type (audio, video, electronic, etc.). When doing so, it is necessary to bear in mind not only the form, but the primary nature and purpose of the resource: an art installation by Saša Šekoranja composed of plants will not be described as a natural history resource, just as an art object or child's toy in the shape of a book will not be described as a book, since only the outer form, and not the content, has the property of a book.

Apart from mandatory data, the rules contain a large number of optional elements, which the cataloguer may select if they are considered significant to express the context of the resource. For example, the description of a book which is housed in a library, but is considered a museum object because of its special historical and artistic value, will include data on the materials and binding technique, the names of former owners, information on restoration, conditions for accessing it, and other information which is not available for an 'ordinary' book, but which is characteristic of a museum object. Another example: the rules prescribe that only the first statement of responsibility is mandatory, while others may be included if considered important, which means that, for example, along with the name of the author of a literary work, one institution may add the name of the translator, while another may add the name of the illustrator or graphic designer, depending on what is important in the institutional context. Let us recall Lagoze's opinion that each description of an entity is in fact a snapshot of it in a state which is of interest to a particular community (Lagoze, 2000).

User-friendliness

Arranging data in a catalogue in a clear, accessible way, in order to make them understandable to users, is often highlighted as one of the most important cataloguing principles. To implement this principle today is more important than ever. With the development of the web, heritage communities certainly no longer have the exclusive task of organising information, and must rethink themselves in a pluralist environment of differing standards, formats, and vocabularies. In doing so,

their greatest comparative advantages are the quality and reliability of data, but, as is often emphasised, the structure of these data must be adapted in order to be made more accessible on the web. No matter how much this may be necessary, it is not the only requirement. If a catalogue is truly to become an important reference source for users, who are accustomed to simple searches, general availability and user-friendly presentation of data on the web, catalogue descriptions must shed their cryptic aspects and be displayed in understandable, generally acceptable linguistic forms.

Therefore, the rules do not support the use of abbreviations which a user may not understand, particularly in notes. A small number of standard abbreviations are allowed, but it is recommended that cataloguers use full, concise, clear expressions and sentences. In creating controlled access points, it is preferable to use the form generally accepted in the language of the cataloguing agency, which means, for example, that authorised forms of names of persons from the classical world and the Middle Ages do not need to appear in Latin if there is a generally used form in Croatian. The same applies to names of church dignitaries, names transliterated into Roman script and names which have a widely accepted form confirmed in resources and prescribed reference sources in Croatian. We should add the caution that variant forms of names should be included in the description as variant access points and labelled with the type of name (for example, dialect names, popular names, historical names, etc.), which means that each institution may use the form of the name which suits the particular context, in accordance with the needs and expectations of users.

Conclusion

Arising from adaptation to the technological environment and convergence of interests among heritage communities, the new cataloguing rules propose solutions in accordance with the *Statement of International Cataloguing Principles*, international guidelines which are above all intended to help develop rules for description and access to all types of resources in libraries, but which are also applicable to other communities. Therefore, instead of a conclusion, we will briefly show how the solutions described in the paper correspond to some of the most important cataloguing principles. For example, the principle of *convenience of the user* and *common usage* are reflected in flexibility which, with a small number of mandatory description elements, enables the cataloguer to

include in the description the data which are considered most important for users of the particular collection or institution, and to select the form of name or title which will be most familiar to users. The principle of interoperability, which envisages sharing data outside the library context, is satisfied by the implementation of international archival, library and museum standards, and provisions which support the preparation of data for automatic processing and sharing in the web environment.⁸ If descriptions are founded on international documents, this should guarantee the *consistency* and *standardisation*. The principle of *display* and *representation* requires the resource to be described as it appears. So, the most important data which usually appear on or in the resource are placed in a separate chapter and in the provisions on how they are to be presented, the rule of transcription is followed consistently. Separation also means that such data, primarily characteristic of bibliographic description, can be clearly distinguished from data taken from other sources and shaped according to the rules for controlled access points, which are to a great extent common to all heritage communities. Their transcription, as already mentioned, serves as a guarantee of *accuracy*, another very important cataloguing principle. The principle of *integration*, which requires descriptions of all types of resources and forms of names for all kinds of entities to be based as far as possible on a common group of rules, is the main idea behind the rules. Their primary goal is to serve as infrastructure for a range of services and projects which will integrate data on heritage, make research easier, and contribute to new interpretations and widening of the existing knowledge.

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⁸ For example, description elements which envisage the use of a phrase from controlled vocabulary are clearly separated from elements in which the cataloguer freely shapes the text (for example, notes) and which are therefore less suitable for the automated environment.

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PRAVILNIK ZA OPIS I PRISTUP GRAĐI U KNJIŽNICAMA, ARHIVIMA I MUZEJIMA

NAČELA I STRUKTURA

KLJUČNE RIJEČI:

*kataložna načela, kataložna
pravila, baštinske zajednice,
identifikacija, kontekst*

SAŽETAK

Novi pravilnik za opis i pristup građi u baštinskim ustanovama je standard sadržaja podataka prilagođen suvremenim oblicima kataloga i mogućnostima dijeljenja podataka. U tekstu su izložena načela i struktura pravilnika, kao i odnos prema konceptualnim modelima i međunarodnim standardima. Definirane su jedinice kataložnog opisa kojima se bavi pravilnik i prikazani kriteriji za organizaciju elementa opisa. Posebna pažnja posvećena je zahtjevima za jednoznačnom identifikacijom jedinice građe i drugih entiteta povezanih s građom, bez obzira na to u kojoj se zbirci ili ustanovi opisani, ali uz nužno očuvanje specifičnog institucionalnog konteksta.