

Webinar: Profile Editor: Overview and Orientation by Library of Congress,
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Hi everyone, my name is Paul Frank, I'm here with my colleague Les Hawkins, we both work in the PCC Secretariat in the Cooperative Programs section at the Library of Congress and both Les and I have been involved in the Library of Congress BIBFRAME pilot so in the interest of helping the LD4P cohort we would like to give you a brief overview of and orientation to the LC BIBFRAME Profile Editor since those of you in Sinopia will be using the LC BIBFRAME Editor.

We're going to be looking at the Profile Editor under the hood, which is where all the things happen, but we will also want to show you the LC BIBFRAME Editor itself to give you an idea of how the work you do under the hood, how that's reflected to participants working in the pilot. We hope this in an informative session, we're trying to keep it very informal and folksy...

Les

So what we're looking at right now is from the BIBFRAME Profile Editor [showing BIBFRAME 2.0 Monograph Profile], this is a snapshot of the BIBFRAME 2.0 Monograph Profile. It might be good to ask what a Profile is in the context of the BIBFRAME project, the BIBFRAME Profile Editor and the BIBFRAME Editor.

Think of it as a collection of templates, you can look at these as a collection of Resource Templates. A Profile was made up of these interconnected Resource Templates, we give you a template for the BIBFRAME Work, Instance and Item. Then further, it goes deeper, we developed a set of templates for the properties that are a part of the larger Resource Template or part of a larger Profile.

Paul

We'll look at examples, but it's all about organization and one of our lessons learned is that if you organize your work in advance that will pay off big time down the road.

[2:40]

[showing BIBFRAME Work in BIBFRAME Editor, with Create Resource menu on left]

So as we said we're moving away from the Profile Editor, now we're looking at the BIBFRAME Editor itself. We thought it would be nice to start with a view and a short discussion of the bibliographic Profiles we're using in the LC BIBFRAME Pilot, and you see those in the box on the lefthand side of the screen. We have 10 different bibliographic profiles that we use, based on the needs of the participants in the BIBFRAME Pilot. On the right-hand side of the screen you see a default display... depending on which Profile you click on, it shows the top part of that profile, in this case it's the BIBFRAME Work for a Monograph that you see on the screen.

A couple things that are important to point out now and I'm sure we'll repeat them as we go along, when you look at that right-hand side of the screen, you'll see the grayed out areas, for

example under Creator of the Work, Primary Contribution, the background of Primary Contribution is grayed out, the same with Title Information, Form of Work, but then all of a sudden you get the Date of Work and you don't have a grayed out area. This is a reflection of what has taken place in the BIBFRAME Profile Editor, wherever there needs to be a lookup or a link to another Resource Template in the Profile Editor, the resultant screen to the user will be grayed out, so every one of these gray boxes means that when you click on that you're going to be taken to another set of templates that are wired into the Profile for the Monograph. The boxes that don't have the gray background that are just purely white background, those are literal data entry points and we'll see how those are reflected in the BIBFRAME Profile Editor but generally those types of fields will be populated with transcribed information from the resource, they won't have a lookup or reference to another template.

[new slide, focus on Create Resource menu]

On that previous slide along the left-hand side where you saw the 10 different bibliographic resources if you had clicked on any one of those you would get a short dropdown list that allows a user to hone in on the specific part of the Profile they want to describe so for instance under Monograph they could go right to the Instance or they could go right to the Work. These are not controlled terms and in fact you can decide what you want to have here, when we get to the end of today's presentation we'll talk a little bit about Item information, there's no reason why we couldn't have Item as one of these dropdowns as well.

On the Notated Music Profile you'll see Create Work, Create RDA Expression, and Create Instance. We've been doing a lot of experimentation in the BIBFRAME Pilot and one of our big challenges has been to reconcile the lack of RDA Expression in the BIBFRAME ontology. BIBFRAME has Work, and RDA has Work and Expression, so in BIBFRAME, an RDA Expression becomes a BIBFRAME Work. So music catalogers who are heavily dependent upon authorized access points for works and expressions in RDA, we've tried to meet their specific needs by having a different set of dropdowns under Notated Music.

[6:30]

Les

Provides for a lot of flexibility it's really helpful for the experimentation with the different formats, because it seems like each different format has some special needs.

[6:45]

[new slide, BIBFRAME 2.0 Monograph Profile in Profile Editor]

Paul

So what we're looking at here now is...the vocabulary is really important, we need to be consistent in our use of vocabulary...we're actually looking at the Monograph Profile in the BIBFRAME Profile Editor. Now at the top of every Profile in the BIBFRAME Profile Editor you have metadata about the Profile, and we've highlighted here the ID, the Description, the Author, the Title and the Date. All of these are important bits of information but arguably we might say

that the ID is the most critical because this is how the Profile will be identified in the Profile Editor. That's important to keep in mind because when you start adding Resource Templates to any Profile that you're creating it will be looking up against the ID so you'll get a dropdown list and you select the ID that you want.

The naming convention that we chose here is fairly basic and understandable; we begin with lowercase "profile" followed by colon, bf2 stands for BIBFRAME vocabulary 2.0, the newer vocabulary for BIBFRAME, then a colon, and the bibliographic resource for a Monograph. As you'll see in upcoming slides you can append suffixes to that ID to create separate Resource Templates that fall under the Monograph Profile.

Description and Author, Title, are textual, that you input. These are not controlled in any way. Les has discovered that Date actually is sort of a machine generated...

Les

You have to check that, if you make changes you may want to check the date to be sure that it's changed and if not you may have to change it by hand, that's what we've run into, at least early on in the BIBFRAME 2.0...

[8:50]

Just the other thing, to focus more in on that ID, it really is important because you'll see that a Resource Template can be set up as a Profile, it can be set up within a Profile, and you can use that, if you want to access, or refer to a Resource Template that's within another Profile or that's a standalone Profile, that ID is very important, that's the reference, that's how you actually refer to it and grab that Profile or that Resource Template to be able to pull it in so that the cataloger sees a set of windows that they go into to complete the cataloging so it's a very important part of the BIBFRAME Editor.

Paul

Beneath the metadata here under this Monograph Profile you'll see BIBFRAME Work, BIBFRAME Instance, BIBFRAME Item, and Related Manifestation, that's not the end of the list, it goes on and on. But these are actually Resource Templates that are part of this Monograph Profile.

Les

So you're beginning to see that the Monograph Profile is a collection or an array of Resource Templates. When we dig down further here...

[new slide, scrolling down in the Profile]

Paul

Right we're going deeper here, pay special attention to the ID here

[profile:bf2:Monograph:Work], so in the previous slide we had the Monograph Profile but now

we're down into the Work Resource Template within the Monograph Profile so we have that suffix after the colon there Work showing that this is the BIBFRAME Work, and to the right you see Resource URI, this is a BIBFRAME vocabulary term that shows up in the Resource URI for the Work. The Resource Label again is textual you can put anything you want here to help with identification. But then the bottom part of the screen shows Property...

Les
Property Templates

Paul
Now we're at the lowest level of what the BIBFRAME Profile Editor allows us to define. We don't really need to go any lower. This is the data that we will use for catalogers to input data. Now we're seeing it here in the BIBFRAME Profile Editor but on the next slide you'll see how it looks in the BIBFRAME Editor.

Les
These are properties but some of them are actually quite simple boxes, when the cataloger views these in the BIBFRAME Editor, some of these are literal boxes that the cataloger fills in, Date of Work is just that empty box Paul showed you before; others are Lookups which refer to a Resource Template or a resource for actually doing a lookup in LC name authority file or LCSH. There's a variety of different ways of configuring Properties as well as the larger Profiles.

[12:15]
[new slide: BIBFRAME Work in BIBFRAME Editor]

Les
These are the same elements, these are the same properties that we saw in the previous screenshot...so you see Date of Work, the lookup is available under Primary Contribution so there is a reference to a lookup in within that Resource Template that we viewed as a property in previous screen. And again we can identify the Resource Templates by these grayed out areas here in the BIBFRAME Editor and you see a simple box for a literal in these boxes here.

Paul
Maybe this is a good place to point out you'll see the hyperlinks that are in sort of blue bolded letters to the RDA toolkit so a cataloger working in BIBFRAME will be able to click on that link for example Creator of Work and after an initial to the RDA Toolkit the link will go directly to that instruction sheet, so when we go back and do a review of the BIBFRAME Profile Editor we can show you exactly where you put those links to provide access to the RDA Toolkit.

[13:41]
[new slide: back to Profile Editor showing the "Guiding statement for the use of this resource", which is the link to the RDA toolkit.]

Paul

There it is! So right there where Les is highlighting "Guiding statement for the use of this resource" now this is Date of Work again so RDA has a specific instruction on Date of Work, it's RDA 6.4, so you see the link there, the URL that we input, that's what provides the hyperlink in the Editor that goes directly to RDA 6.4.

Actually equally important maybe even more important what we want to point out in this slide is the Type where it says "literal". Now remember Date, when we we saw the Date box in the Editor it didn't have a gray background indicating that it was connected to another Resource Template, it was simply a literal data input value, so that's what type "literal" means there, that the user will key something in and then click the plus sign or hit the enter key to save that data. There's no lookup here against a controlled vocabulary at all.

Now underneath Type you see Mandatory equals false, well we realized that Date might not always be reported for a work, it might not be available so it can't be reported so we didn't want to make this a required field...if we wanted this to be required we would have clicked on the dropdown and put True and that would require it to be added.

To be perfectly honest so far in our experimentation with BIBFRAME at LC we haven't tested real validation of records, never checked to make sure the required elements, or core elements maybe in RDA, have been included in bibliographic description but there is a way to do that in the BIBFRAME Profile Editor.

Under Repeatable we have true because you might have more than one date associated with the resource, we don't want to limit it to just one date.

Les

I'll just point out here that this is actually a value type so that you can use this dropdown window to select literal as we have here, but you have other choices, you can select a lookup, you can select a resource, those are probably the three main ones that we've been using to provide...there are two others, target and list, but we've really focused on...

[16:30]

[new slide: Property Template for "Subject of the Work"]

Paul

Here's a more complex example of a property resource because we have under type "resource" indicating that here we will be linking to other resource templates and we will also be linking to lookups. So this is a more powerful use of the BIBFRAME Profile Editor to provide the necessary links.

Otherwise the naming is consistent and the property URI we're relating to BIBFRAME vocabulary for subject, under property label that's a textual piece of data that's linked to the RDA

Toolkit for Chapter 23 on subject access. We don't want to have this be a required field so Mandatory is false and Repeatable is true because you can have several subjects that are assigned to a resource.

We'll come back and talk about subjects a little bit later in more detail but the main thing is to contrast this example with the previous one on Date of Work which was a literal value whereas now we have a resource that links to other Resource Templates.

Les

So the selection of value type resource gives you that ability to link to other resource templates.

[18:04]

[new slide: property template for "Content Type"]

Paul

This is a real interesting one, so Content Type, do you want to talk about that?

Les

Let's start from the top. Content Type and guiding principle here is RDA 6.9 and we've coded our value type as a resource so that means we want to be able to point to a resource template, such as a controlled content list. This screen will also show us some of the constraints that you can apply to these resource templates. One of them is to define a default value within that BIBFRAME Editor that the cataloger encounters. In this case we've provided a default value of text. For LC that makes sense because most of the monographs that we have are going to be the content type of text.

We've got two things that show that, the first way to constrain that to a textual type content is to define this Default URI as content type text. We're pointing here with this URI to id.loc.gov and we're pointing to one of the RDA content types that are encoded in id.loc.gov. That's our first step, if we only did that step the cataloger would just see one of these codes in the BIBFRAME Editor, so we want them to see more than txt, we want them to see a Default Literal so we define this Default Literal as what's going to show up in the BIBFRAME Editor for the cataloger.

We also have a way out of this if the cataloger has a content type that's different from text. Since this value type has been defined as resource, we can refer, select a value for a content list, a content type list which is encoded in id.loc.gov and it allows the cataloger to leave that textual content type and select from that controlled list, the RDA content types that are encoded in id.loc.gov.

The other thing that we've done is a cataloger can't change this text by typing in to the Editor and just typing a different content type and that is kind of accomplished by this constraint up here Editable and we say false so the cataloger in the BIBFRAME Editor can't just overwrite the word text or delete the word text but they can select the dropdown list of controlled values for content type that are available from this URI.

[21:10]

[new slide: BIBFRAME Editor]

Paul

Let's look at how this is reflected in the BIBFRAME Editor itself. So a cataloger is describing a monographic resource and they come to Content Type and they see the default value text and if that's correct then they just move on to the next data element but if it turns out that this monograph is not textual in nature they click on that little trash can and that removes "text" and they click on the Content Type lookup and all the values that are available come up and that's what Les just pointed out and that's why we had that URI for the entire list of Content Types in id.loc.gov

I also wanted to point out that in the LC BIBFRAME Pilots we made a decision that our controlled lookups will all be to id.loc.gov, the LC linked data service. The lookup could just as easily have taken place to the RDA registry using the lookup value the URI/URL that would refer you to the term in the RDA Registry, but we have downloaded a set of those content types into id.loc.gov along with media types. That's just a choice that was made. That's how what Les just showed you in the BIBFRAME Profile Editor is reflected in the BIBFRAME Editor itself.

[22:42]

[New slide showing Language property template]

Paul

Now Language is another resource type. So what this means is there will be a resource template connected to this and also a lookup, so Value Data Type URI shows you the lookup and the template that's used to provide this lookup is through the language resource template. That Language2 added, that naming could be because there is a separate language for another purpose that's used, and this needed to be distinguished from that one? Not really sure whether this is experimental or seeing if we can break the system...

Les

I'd like to just say that this profile, this is actually a Resource Template that is within another Profile that is available in the BIBFRAME Editor when you look through the available Profiles, the Profile is called Language, and then when you go into that Profile you will see this resource template Language2 that allows you to search the MARC code list of languages, 06.11 in RDA.

Also within that, we're not showing you that Language template, but there's also a box there for you to write a Note about language. So this is just an example of using a Resource Template, which is embedded within another Profile, to be able to do just the language search, the lookup to the MARC language codes.

Paul

And you know from MARC cataloging that we record information about languages in many different ways, it's controlled in the 008, it might be textual in the 546 note, that's the language of an item, so language needs to be addressed in multiple ways in BIBFRAME.

[25:00]

[New slide: back to Property Template "Subject of the Work"]

Paul

Now we're back to subjects again and we'll go into a little bit more detail on this property template for Subject of the Work. Type is definitely resource and you can be assured of that by looking down at the bottom of the screen under Templates where we have the three different templates highlighted. This is an example of the ability to include more than one template in a property template, to link out, and what this will do is provide the user with three different search options. Now the reason we need this for subjects is just the nature of LCSH and its use of subdivisions that are often not fully under authority control in terms of being entire strings to which they're added.

So we need to have a topical search in subjects which understandably not only would LCSH but would include the Name Authority File because most names are appropriate as subjects, so we need a search element but we also need to have a way to sort of take the components, the facets, of an LCSH subject string and provide links to the authorized forms of those strings or of those subdivisions.

It's an area that we've been doing a lot of experimenting in and will continue to do experimenting in and I'm actually excited to see how Sinopia users deal with this, but this is what we've done here at the Library of Congress.

[26:40]

[new slide: screenshot of what Search subject components looks like in BIBFRAME]

Paul

So the user view of what you just saw in the BIBFRAME Profile Editor shows the 4 different resource templates: Heading or Topical subdivision, Geographic heading, Chronological or Form subdivision. So what you see on the screen underneath all of those:

Elections--Maryland--21st century, perfectly valid LCSH string with a topic geographic subdivision and a chronological subdivision and each of those was selected by clicking on the correct Subject component template and looking up in LCSH and in the case of Maryland in the LC NACO authority file because Maryland represents a jurisdiction in the Name Authority File and then after clicking Save Changes this package will be saved as an LCSH string and we can mint a URI for it, it won't be a an LC?N like you would expect to see in MARC but it certainly could mint a unique ID that could be used to represent this string that previously was not under authority control.

[27:51]

[new slide: property template for Search subjects]

Paul

Here's a few of the property templates for the specific search, again, at the very bottom, LCSH and the Name Authority File. What else do you see that's interesting about this, oh, here's a lookup, here's an example of type lookup. That's the first time we've seen that.

Les

We've been referring to these other Resource Templates that have a lookup within them so we're actually down to the place where the lookup actually happens so the value Type is lookup and the value URIs point to the Name Authority File...

Paul

At this value level you could certainly add additional controlled vocabularies. You could add LCDGT, LCGFT, any data set that's represented in id.loc.gov including external, outside the linked data service we have here, but for our purposes, for the Pilot, we need catalogers to be able to search against LCSH and the Name Authority File.

Les

It's an exciting area because I know that there are people interested in using other types of vocabularies and I'm sure you will all be experimenting with those.

[29:15]

[New slide, Search subjects in BIBFRAME Editor]

Paul

So here's the view reflected to the user under Search subjects, well this user is searching united states--climate and sees there is an established LCSH topic subdivision United States--Climate, could click on that. In the case that I'm using an example the cataloger actually would like to include a further subdivision "observations", which is valid, a valid use under United States--Climate, but that complete string United States--Climate--Observations is not under authority control so the cataloger would need to start with United States--Climate and then go to the subdivision search and find Observations and then create that package that we saw previously with the Maryland Elections.

Even though we have a lookup pointing to two different authority files, they're combined in a sense, you don't have to search first in LCSH and then search in LCNAF, the combined results show here, LCSH followed by LCNAF. I'd have been really surprised if there had been United States--Climate in the Name Authority File but you never know...

[30:35]

[New slide: Search subjects for ferrante, angelo]

And then on the next slide you see for example a cataloger may have a biography of this person and of course there would be a need to have the name authority authorized access point be used as subject access so the lookup goes on both but it only finds one hit in LCNAF.

Les

One-stop shopping for doing your searches.

Paul

Consolidated searching

[31:02]

[New slide: What about Item information?]

Paul

We thought we'd sort of wrap up our little presentation with a discussion of item information only because this is relatively new in our experimentation but I have a feeling that the cohorts will probably be looking in depth at Item information.

There's nothing different about the way you would format the data that's necessary for Item information in BIBFRAME. In the example you see on the slide here, this is the BIBFRAME Editor itself, the user view, and the user is describing an Instance but now would like to add Item information about that Instance and you can see that it's a resource template because it's a grayed out background so you would click on that and be taken to the actual Resource Template that allows all sorts of information to be recorded.

[32:00]

[New slide: BIBFRAME Item]

Paul

The one thing that jumped out, probably parenthetically interesting, not really relevant, is that under Item there's only one link to the RDA Toolkit and that's under Custodial History of Item. All the other labels that you see here refer directly to BIBFRAME vocabulary terms. Many of these have their own Resource Template, and the ones that are not highlighted are actually literal values...just textual entry, saved that way.

[32:50]

[back to What about Item information slide]

Les

As we are kind of following this, this is from the Instance view and the BIBFRAME Editor comes from the Resource Template for the BIBFRAME Instance within the Monograph Profile.

[back to Item slide]

and then again this is the Item Resource Template within the Monograph Profile, subresources, resource templates, from the Monograph Profile.

Paul

I just noticed, very similar to the Content Type, here's an example of a Held By default value for the Library of Congress, DLC

Les

Another default value there, and we've got...

[33:28]

[back to "What about Item information"]

Les

This is from the instance but you pointed out earlier that these are also default values, the volume and the mediated.

[33:42]

[new slide: BIBFRAME Item Resource Template in Profile Editor

Les

Oh here's the BIBFRAME Resource Template for the Item, looking at the property values for the BIBFRAME Item Resource Template.

[34:00]

[new slide: BIBFRAME 2.0 Identifiers Profile]

Les

We have the Profile we've got set up for Identifiers.

Paul

Within the Item you saw there was an area to key in or to scan in a Barcode but a Barcode is only one type of identifier, as you see on the screen here there are lots of different identifiers, this is just the beginning, there could be many many more.

So basically what we have here is a Resource Template that has sub Resource Templates, right? The Profile is for the Identifier, the Resource Template itself is Identifier and then it has all different types of identifiers.

So here's something we learned throughout the pilot as we went from Phase 1 to Phase 2, the importance of consolidation cannot be overemphasized, so we decided to have this sort of big large Resource Template with all the identifiers that might be needed regardless of the bibliographic resource and then within the profiles for each bibliographic resource we link to these resources, but the nice thing about it is that in the case of the Item and the Barcode we're not linking directly to the Identifiers itself, we're going further down to sub elements, maybe you can explain that a little bit better. The highlighted Barcode there is what will be the link in the Item...

Les

Right, that very important profile ID...you'll be able to point to each one of these from wherever you are in the other Profiles or other Resource Templates. So they're kind of all in one place,

you don't have to set up a Profile for different types of formats and things and repeat all of these different identifiers. Each one of those could point out to this one place to get them.

This is just an example of it, there are other examples that we've experimented with, Titles and things like that, there have been a number of things that we've gone through, or that Jodi Williamschen, our colleague, especially experimental, is going through them, trying to find out where there's a place where you can gather these similar things to point to rather than having to repeat them in each separate Profile.

[36:45]

[New slide: Barcode resource template]

Les

So this is a Resource Template for the Barcode.

Paul

You can see with the naming convention under Templates there rather than just Identifiers we go further down to the Barcode part of that identifier. So a user in the BIBFRAME Editor clicking on Barcode won't see any of those other Identifiers, the user will just go directly to the Barcode and be able to...

Les

Now if you had a Resource with multiple types of identifiers, you could set up multiple templates down here to point to the other appropriate identifiers and they're all in one location and you can just reference it because the different identifiers are already there.

[37:42]

[New slide: "Things to Keep in Mind"]

Paul

Some things to keep in mind as we close. We know very well that the LC BIBFRAME Profile Editor has some limitations. Our experience shows that there can be slow response time when we're editing a Profile in the Editor. The nice thing about this is I think this is an issue unique to the LC because our resources are generally spent on our production databases and we were using test databases in working with the BIBFRAME Pilots so our slow response time might have something to do with that. I've noticed that when I played around in Sinopia a little bit with profiles there the response time was much faster so I don't think this will be an issue for Sinopia users, for developers of profiles in Sinopia.

We've learned, the hard way actually, that the BIBFRAME Profile Editor has some structural architecture that results in duplication, so for example, Barcode might be a good example, initially we would have had a separate Resource Template for Barcode where we learned well we don't really need to repeat that for each bibliographic Profile, we can have one Resource Template for all the Identifiers and just link to that. The BIBFRAME Profile Editor generally is

very amenable to that but I think we learned the hard way that the built-in duplication could be avoided by smart thinking and doing things a different way.

Our profiles have been built over time, in fact, that's why when we started our presentation today we pointed out that our IDs have bf2, the BIBFRAME 2 vocabulary. We still have profiles that are based on BIBFRAME 1 and we have developed those and turned them into BIBFRAME 2 profiles, so our needs have changed over time just as the cohort's needs will probably change over time. Our development process has been iterative...

A lot of us were anxious to play around with this, to test it out, to learn it, but we might be beginners in many ways there was a certain amount of trial and error to see how things work but I don't think that's any different for our audience, for the cohorts, it's fun, it's a lot of fun to play around with. It's especially fun when you get the desired result and can see that the user will benefit from the work that you've done. The most important thing is to keep in mind that for our pilots and even for LD4P2, for cohorts, these are all test environments, we're testing to see what works and what doesn't work. Perfection is our goal but certainly not a prerequisite. We didn't start out with perfection, we're trying to achieve it and I don't think the cohorts will be any different.

Les

It's a sandbox, go play.

Paul

The hose is there to rinse off the sand.

Ok everyone I think that's it.

Thank you, we hope this was helpful to you all