RDA? GAME ON!!

A BCLA/BCCATS PRECONFERENCE
APRIL 22, 2010
1:30 – 5:00 PM

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Game Plan for the Afternoon

Why RDA?

When RDA?

RDA building blocks – FRBR, FRAD

Major changes from AACR2

BREAK

Examples illustrating RDA

Sneak peak at RDA Toolkit

Wrap Up

HOW WE GOT HERE

- September 2004   Editor of AACR3 appointed
  - new edition, with the working title of "AACR3 : Resource Description and Access", will be published in 2007

- December 2004   Draft of AACR3

- April 2005   Renamed RDA

- December 2005   Draft RDA Part 1
  - initial release of RDA in 2008.

- June 2006   Draft of Chapters 6 and 7

- October 2006
  - RDA is scheduled for release in early 2009.

HOW WE GOT HERE

- October 2007   RDA structure reorganized
- Dec. 2007   RDA Draft Sections 2-4, 9 Released
- April 2008   JSC changes date of issue for the complete draft for constituency review to early August 2008

    First release to be in June 2009

- Nov. 2008   Full Draft to Constituency Review

    Full Release to be Fall 2009

- Nov. 2009   **Publication Date of June 2010 announced**

The Wait is Over!!!

RDA Toolkit WEBINAR

RDA Toolkit
Coming June 2010

The resource to help you navigate from AACR2 to RDA—the new, unified standard for resource description and access, designed for the digital world and an expanding universe of metadata users. RDA Toolkit highlights:

- RDA instructions that are searchable and browseable
- AACR2 Rule Number Search of RDA instructions
- Workflows, mappings: tools to customize the RDA instruction set to support organizational training and processes.
- Two views of RDA content—by table of contents and by RDA element set
- What you need to evaluate and implement RDA; to make cataloging decisions based on principles; to increase efficiency; to facilitate collaboration; and to help position the community for the future by making bibliographic data accessible on the Web.
- Full text of AACR2 with links to RDA

The content of RDA has been developed in a collaborative process led by the Joint Steering Committee (JSC). The project is overseen by the Committee of Principals representing American Library Association, Canadian Library Association, CILIP, Library of Congress, Library and Archives Canada, British Library, and National Library of Australia. The RDA Toolkit is published by the American Library Association, the Canadian Library Association, and CILIP (through its publishing imprint Facet Publishing).

RDA Toolkit Pricing

Licensing fees for the RDA Toolkit (US Pricing)

Why RDA?

- AACR2 published 32 years ago in 1978
- Access to published resources now available across many environments – Library database + MARC no longer the only game in town
- Desire for other information communities to adopt so that same rules of description would be applied to wider universe of information resources
- Major revision needed to bring rules for description into web environment
- AACR3 would not take us far enough

Why RDA?

- Need to transform our stand-alone library catalogues into open repositories of data which expose data about information resources
  - Required a re-examination of logical structure of ACCR2
- Need to move away from the creation of a self-contained description of a single resource presented on a card or in a record
  - Develop standard that defines the attributes of a resource to be described in discrete 'elements' so that those elements can be gathered together in various ways for various uses

Goals of RDA

- Extensible
  - RDA design should allow it to be easily extended to accommodate new requirements for description
- Flexible
  - 0.1 RDA is designed to take advantage of efficiencies and flexibility in data capture, storage, retrieval and display
  - That is – it should allow RDA created descriptions to be displayed to the user in a variety of presentations and to be accessed using a wide range of search tools
- Interoperable
  - Should be compatible with legacy technologies but also ready for use by emerging formats in a web-friendly environment

Implementing RDA

- Concerns about the practicality of RDA resulted in decision to formally test its application in U.S.
  - U.S. National Libraries - LC, NAL, NLM - will test
  - 25 other test partner libraries will also test
  - OCLC's Contract Cataloging section is a test partner
  - Test period from June – December 2010, followed by 3 month evaluation period
- Implementation by these agencies will hinge on test results
- Other countries have committed to implementation
  - Canada, UK, Australia

Library and Archives Canada

- Not participating in the formal test phase
- Will test internally prior to implementation
- Tasks identified
  - Decide which options and alternatives to follow in collaboration with other national libraries and the Canadian Committee on Cataloguing
  - Review LAC's existing rule interpretations for relevancy and revise as necessary
  - Plan for conversion of legacy access points
  - Ensure MARC changes are completed in AMICUS
  - Determine impact of RDA on Union Catalogue reporting
  - Evaluate impact on products (e.g. MARC Records Distribution Service)
  - Create workflows
  - Develop training documentation for LAC and Canadian library community with Canadian Committee on Cataloguing

Timelines

- Testing phase for LC, NLM, NAL and 25 partner agencies is from June 2010 to March 2011
  - June- Sept – training; Oct – Dec - creating of test records
  - Jan – March – evaluation of results
  - Decision to implement will come at end of 2010 or early 2011
- LAC has begun the work needed to implement
  - This will take several months
  - LAC will not implement when RDA is released in June
  - Their implementation is not linked to the timeline of the US libraries testing phase
  - French translation of RDA must be available

Over to Susan

- Underlying principles of RDA
  - FRBR
  - FRAD
  - IFLA IME-ICC principles
  - Others

  Refer to S. Andrews presentation

RDA Principles

- 0.0 Data created using RDA to describe a resource are designed to assist users with the following tasks:
  - Find
  - Identify
  - Select
  - Obtain

Reading RDA

Divided according to two goals of resource description   Identify   and   Relate

No longer organized by class of materials

Each chapter addresses a FRBR user task

2/ Identifying Attributes of Manifestations

& items   FIND / IDENTIFY

3/ Describing Carriers   SELECT

4/Providing Acquisition & Access Information
                        OBTAIN

RDA Key Features

- Language
  - No longer the language of the library's 20th century card cataloguing environment
  - FRBR terminology
  - Computing terminology – element, attribute, relationship
- Data
  - Data should function independently of the format, medium, or system used to store or communicate the data
  - Data should be amenable to integration into existing databases

AACR2

RDA

AACR2

RDA

AACR2

RDA

Table of Contents (My resources)

- ☐ AACR2: Anglo-American Cataloguing Rules
  - ☐ Anglo-American Cataloguing Rules
  - ☐ Credits, Prefaces, and General Introduction
  - ☐ Part I. Description
  - ☐ Part II. Headings, Uniform Titles, and References
  - ☐ Appendices
    - ☐ Appendix A. Capitalization
    - ☐ Appendix B. Abbreviations
    - ☐ Appendix C. Numerals
    - ☐ Appendix D. Glossary
    - ☐ Appendix E. Initial Articles
  - ☐ Index
  - ☐ Amendments

- Appendices
  - + A: Capitalization
  - + B: Abbreviations
  - + C: Initial Articles
  - + D: Record Syntaxes for Descriptive Data
  - + E: Record Syntaxes for Access Point Control
  - + F: Additional Instructions on Names of Persons
  - + G: Titles of Nobility, Terms of Rank, Etc.
  - + H: Dates in the Christian Calendar
  - + I: Relationship Designators: Relationships between a Resource and Persons, Families, and Corporate Bodies Associated with the Resource
  - + J: Relationship Designators: Relationships between Works, Expressions, Manifestations, and Items
  - + K: Relationship Designators: Relationships between Persons, Families, and Corporate Bodies
  - + L: Relationship Designators: Relationships Between Concepts, Objects, Events, and Places
- Glossary

RDA Principles 0.4.3

- Differentiation
  - The data describing a resource should differentiate that resource from other resources.
- Sufficiency
  - The data describing a resource should be sufficient to meet the needs of the user with respect to selection of an appropriate resource.
- Relationships
  - The data describing a resource should indicate significant relationships between the resource described and other resources.
- Representation
  - The data describing a resource should reflect the resource's representation of itself.
- Common Usage or Practice
  - Data that is not transcribed from the resource itself should reflect common usage in the language and script preferred by the agency creating the data.

RDA / IFLA Representation Principle

Take what you see /Accept what you find

- Do not abbreviate
  - AACR2 uses abbreviations in certain transcribed elements such as edition, numbering, place of publication
  - RDA permits abbreviations in transcribed elements only if that is how they are represented on the source

- Do not correct errors
  - AACR2 directed that inaccuracies be corrected
  - RDA requires inaccuracies to be recorded as they appear
  - No more use of [sic] or [i.e._____]

Transcription and Notation

1.7.1 When the instructions in chapters 2–4 specify transcription of an element as it appears on the source of information, apply the general guidelines on capitalization, punctuation, symbols, abbreviations, etc., given under

1.7.2–1.7.9 .

- 1.7.2
  - **use only those abbreviations found in the sources of information for the element.**

Use of Abbreviation

- B.4   Transcribed Elements
- For transcribed elements, use only those abbreviations found in the sources of information for the element.
  - If supplying all or part of a transcribed element, generally do not abbreviate words.

- Alternative

  If the agency creating the data has established in-house guidelines on the use of abbreviations, or has designated a published style manual, etc., as its preferred guide, use those guidelines or that style manual in place of the instructions given in this appendix.

Learning the Lingo

- AACR2R
  - First Level of Description
  - Chief Source of Information
  - Physical description
  - Notes on the content
  - Author
  - Heading
  - Main Entry
  - Choosing added entries

- RDA
  - Core Element Set
  - Preferred Source
  - Describing carriers
  - Describing content
  - Creator
  - Authorized access point
  - Preferred access point
  - Recording relationships

Learning the Lingo

- AACR2
  - GENERAL MATERIAL DESIGNATION
  - SPECIFIC MATERIAL DESIGNATION
  - EXTENT

- RDA
  - MEDIA TYPE
  - CARRIER TYPE
  - CONTENT TYPE

1st Level Description vs Core Element Set

Title proper	Title proper
First Statement of responsibility	Statement of responsibility
Edition statement	Designation of edition
Material (or type of publication) specific details	Designation of named revision of edition
First Publisher, place	First place of publication
Date of publication	First publisher's name
Extent of item	Date of publication
Notes	Title proper of series
Standard number	Numbering within series
	Identifier for manifestation
	Carrier type
	Extent

Reading RDA

- CORE IF statements
  - Place of distribution **is a core element** for a resource in a published form **if** the place of publication is not identified.
- Each instruction applies to all types of material / physical formats.
- Some guidelines and instructions in chapters refer specifically to resources issued in a particular manner.
- At certain points you are offered
  - Options for additions or ommission
  - Alternatives to the stated rule

Reading RDA

- Examples

- The examples in RDA illustrate the application of the specific instruction under which they appear. They illustrate only the data that are addressed by that instruction.

- Examples are normally given without showing the preceding or enclosing punctuation that is prescribed for an ISBD presentation. (given separately in appendix D .)

FOR EXAMPLE

Eskimo women's music of Povungnituk
   musique des Esquimaudes de Povungnituk

Title proper in Inuktitut: Arnait puvirnitumiut katutjatut amalu qanirpalutut. Parallel titles proper in English: Inuit throat and harp songs, and in French: Chants inuit-gorge et guibarde

Meisterwerke der botanischen Illustration
   masterpieces of botanical illustration
   chefs-d'œuvre

Title proper in German: Ein Garten Eden. Parallel titles proper in English: Garden Eden, and in French: Un jardin d'Eden

Sources of information

AACR2
specifies chief source of information for each class of material

RDA specifies preferred source of information for three categories :

- One or more pages, leaves, sheets, cards
- Moving images
- Other resources

2.1.2.2 When preparing a comprehensive description for a resource issued as a single unit choose a source of information identifying the resource as a whole

Sources of information

R
D
A

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

- the type of description (see **2.1**)

and

- the presentation format of the resource (see **2.2.2.2–** .

- **2.2.2.2** use the title page, title sheet, or title card (or image thereof) as the preferred source of information.

Information From Outside Chief Source

AACR2

requires this information to be enclosed in [ ]

RDA

- RDA requires [ ] ONLY if information is from **outside the resource**

From RDA Chapter 1

A resource may be described in any of the following ways that are applicable and appropriate to the purpose of the description:

a) using a comprehensive description

b) using an analytical description

c) using a hierarchical description

This is covered in AACR2 Chapter 13 Analysis

Elements of the description

- Transcribed elements
  - Title / Statement of responsibility
  - Edition statement
  - Publication statement (Place, Publisher, Date)
  - Numbering

- Recorded elements
  - Carrier information
    - Physical characteristics
  - Content information

TITLE

AACR2

- Other titles optional
- If no collective title transcribe first named as title proper

RDA

- Other titles optional
- If no collective title devise one

General Material Designation

AACR2	RDA
A subfield of title element	Replaced by three discrete elements
Mix of content and carrier information	

Media type	3.2
Carrier type	3.3
Content type	6.10

Statement of responsibility

AACR2	RDA
Record those associated with a work up to a maximum of 3	Record all names associated with the creation of the work presented on the resource
• 1.1F5 If more than 3 record first named and use [et. al.]	• *Optionally*
	○ *Omit all but the first. Indicate the omission by summarizing what has been omitted in language of agency preparing description [i.e. not in Latin]*
	○ **Roger Colbourne [and six others]**

Place of Publication

AACR2

- Transcribe a place of publication, etc., in the form and the grammatical case in which it appears.

- Transcribe name of country, state, province if it appears.

- **Use abbreviations**

RDA

Transcribe places of publication and publishers' names in the form in which they appear on the source of information.

- Apply general guidelines on transcription given under 1.7

- **use only those abbreviations found in the sources of information for the element.**

Publisher

AACR2	RDA
• 1.4D2 Give the name of the publisher in the shortest form in which it can be understood	2.8.1.4 Transcribe places of publication and publishers' names in the form in which they appear on the source of information. *Optionally* *Omit levels in a corporate hierarchy that are not required to identify the publisher*

Date of Publication

AACR2

- Substitute arabic numerals for roman in the date of publication
- Substitute arabic numerals for numbers expressed as words

RDA

Record dates of publication applying the general guidelines on numbers expressed as numerals or as words given under 1.8

1.8 When recording numbers expressed as numerals or as words in a **transcribed element**, transcribe them in the form in which they appear on the source of information.

Publication statement

AACR2

- If no place or probable place can be given, give s.l. (sine loco), or its equivalent in a nonroman script.

- If the name of the publisher, distributor, etc., is unknown, give s.n.

- Paris : [s.n.]

RDA

- If neither a known nor a probable local place or country, state, province, etc., of publication can be determined, record

  - Place of publication not identified.

  - record publisher not identified.

Choice of Access

AACR2

- 21.1A2 Enter a work by one or more persons under the heading for the personal author

- 21.6C2 If responsibility is shared among more than three persons or corporate bodies **enter under title**

RDA

- 6.27.1.3 If two or more persons or corporate bodies are responsible construct the authorized access point by combining the AAP for the person with principal responsibility with title

- **IF principle responsibility not indicated enter under first named**

Construction of Access Points

- Key changes to the construction of headings
  - Headings for the Bible
    - Do not use O.T. and N.T.
    - Use instead Old Testament and New Testament
    - Do not use O.T. or N.T. intervening with individual books of the Bible
  - Treaties
    - Enter under first country named regardless of order

ADAM'S TURN TO TALK

E-LIS ADDRESS FOR PRESENTATION
GO TO:
HTTP://EPRINTS.RCLIS.ORG/18328/1/BCLAPRESENTATION.PPT

RDA and MARC

RDA is independent from any encoding method

BUT

RDA is expected to facilitate a move away from MARC to an encoding method that allows resource descriptions to be more actionable

MARC21 – changes have been made to allow us to continue to use MARC until a new encoding standard emerges. This will improve the data structure now in preparation for what the future brings.

MARC21 Changes to Accommodate RDA

- MARC21 Format for Bibliographic Data
  - 336   Content Type
  - 337   Media Type
  - 338   Carrier Type
  - 588   Source of description note
  - New codes in 007 and 008

  - 007   new values for content designators for smd
  - 008   new values for form of music compositions, form of item
  - Subfield $i Relationship information
    - added to 700,710,711, 730

MARC21 Changes to Accommodate RDA (2)

- MARC21 Format for Bibliographic Data
- 380 Form of Work (R)
- 381 Other Distinguishing Characteristics of Work or Expression (R)
- 382 Medium of Performance (R)
- 383 Numeric Designation of Musical Work (R)
- 384 Key (NR)

MARC21 Changes to Accommodate RDA (3)

- New fields in Authorities format

- 621 Associated Place   625 Occupation
- 622 Address   626 Gender
- 623 Field of Activity   627 Family info
- 624 Affiliation   628 Associated language

OCLC MARC21 UPDATE

Implementation of MARC Updates No. 10 and 11

   on May 16, 2010. Technical Bulletin 258, to be released within a few weeks, will have details.

OCLC is postponing implementation of Computer Files 008/23, 006/06 (Form of item) from MARC Update No. 11,

Because they are not specifically RDA-related, the implementation of subfields $3 in Bibliographic and Authority fields 034, and subfields $5 in Bibliographic 800-830 fields have also been postponed until our next OCLC-MARC Update.

SNEAK PEAK OF RDATOOLKIT

BETA VERSION TOUR

RDA

READY

SET

GO!